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THE MARKET FOR PORK:
IN ONTARIO AND NATIONALLY

A RESEARCH REPORT PREPARED FOR:
ONTARIO MINISTRY OF
AGRICULTURE AND FOOD

SURVEY NO. 4149/4152
JULY, 1987

ISL INTERNATIONAL
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1. INTRODUCTION

STUDY BACKGROUND

IN NOVEMBER 1986, ISL INTERNATIONAL SURVEYS LTD. WAS COMMISSIONED TO CONDUCT A NATIONAL CONSUMER PORK USAGE AND ATTITUDE STUDY ON BEHALF OF THE ONTARIO MINISTRY OF AGRICULTURE AND FOOD.

THE ONTARIO MINISTRY OF AGRICULTURE AND FOOD IS INVOLVED IN A CO-OPERATIVE EFFORT WITH VARIOUS SECTORS OF THE PORK INDUSTRY TO IMPLEMENT A PROGRAMME - THE ONTARIO PORK INDUSTRY IMPROVEMENT PLAN (OPIIP) - DESIGNED TO:

- IMPROVE THE PRODUCTIVITY, PROFITABILITY AND COMPETITIVENESS OF ONTARIO PORK PRODUCTS
- DEVELOP A SOUND MARKETING STRATEGY FOR MARKETING PORK AND PORK PRODUCTS

THE NATIONAL CONSUMER USAGE AND ATTITUDE STUDY IS A KEY ELEMENT OF OPIIP AND IS TO BE CONDUCTED ONCE EVERY FIVE YEARS, WITH THE BROAD OBJECTIVES OF IDENTIFYING:

- THE DOMESTIC DEMAND FOR PORK AND PORK PRODUCTS

- CONSUMER PERCEPTIONS ABOUT PORK SO THAT APPROPRIATE PRODUCT, MARKETING AND ADVERTISING STRATEGIES CAN BE DEVELOPED

RESEARCH OBJECTIVES

THE PURPOSE OF THE RESEARCH WAS TO OBTAIN A RELIABLE, REPRESENTATIVE NATIONAL DATABASE ON THE USAGE OF AND ATTITUDES TOWARDS PORK (IN ALL ITS AVAILABLE FORMS) WITHIN THE OVERALL CONTEXT OF MEAT CONSUMPTION WITHIN CANADIAN HOUSEHOLDS. MORE SPECIFICALLY, THE OBJECTIVES WERE TO:

I) ESTABLISH PORK CONSUMPTION PATTERNS
II) IDENTIFY USER GROUPS, THEIR SIZE AND CHARACTERISTICS
III) ASSESS "PORK" AWARENESS AND FAMILIARITY
IV) ESTABLISH PORK PURCHASE PATTERNS
V) UNDERSTAND BARRIERS TO PORK USAGE
VI) ASSESS PRODUCT SELECTION CRITERIA, ATTITUDES AND PERCEPTIONS
VII) PROVIDE INSIGHTS INTO POTENTIAL AREAS OF NEW PORK PRODUCT DEVELOPMENT

SURVEY METHODOLOGY

INITIALLY, A PRELIMINARY QUALITATIVE STUDY WAS IMPLEMENTED TO ESTABLISH THE RELEVANT ISSUES AND TO REVIEW CONSUMER PERCEPTIONS OF THE PORK MARKET AND PORK VARIETIES. AS SUCH, EIGHT FOCUS GROUPS IN TORONTO, MONTREAL (FRENCH) AND VANCOUVER WERE CONDUCTED.

FOLLOWING THE FOCUS GROUP STUDY, THE MAIN STUDY WAS EXECUTED AS TWO INDIVIDUAL SURVEYS:

- MEAT USAGE DIARY
- USAGE AND ATTITUDE STUDY

FOR THE MEAT USAGE DIARY, 2,700 HOUSEHOLDS ACROSS CANADA (BASED ON THE CONSUMER PANEL OF CANADA SAMPLE) RECORDED ALL MEAT USAGE (INCLUDING FISH/SEAFOOD) FOR ALL HOUSEHOLD MEMBERS FOR THE WEEK OF JANUARY 19 - 25, 1987.

THE MEAT USAGE PORTION OF THE SURVEY DIRECTLY ADDRESSED THE FOLLOWING ISSUES:

- PORK CONSUMPTION PATTERNS
- USER GROUPS, THEIR SIZE AND CHARACTERISTICS
- THE TARGET AUDIENCE

In total, the diary monitored 250,000 possible meat eating occasions. The usage data collected from the Panel sample was ultimately projected to reflect the total Canadian population.

For the usage and attitude portion of the survey, 1,001 main grocery shoppers were interviewed for approximately 60 minutes on a personal basis in their homes. Each respondent was asked their usage of and attitudes towards pork and other meats. The interviewing, conducted in February 1987, was completed nation-wide but with an emphasis on Ontario. The attitudinal survey addressed:

- awareness of meat
- usage of meat (by type and cut, by time of year, by meal time)
- frequency of usage/serving
- purchasing behaviour (past and future)
- in-home vs. out-of-home usage
- attributes of meat types
- attitudes towards meat types
- processed pork (usage, purchasing, attributes, attitudes)
- interest in new cuts of pork

THIS REPORT BEGINS WITH A SUMMARY OF THE MAIN SURVEY FINDINGS AND THE RECOMMENDATIONS AND CONCLUSIONS WE DRAW FROM THESE. THIS IS FOLLOWED BY A DETAILED ANALYSIS OF THE SURVEY FINDINGS WITH TABULAR EXTRACTS APPEARING THROUGHOUT THE TEXT AS APPROPRIATE.

FULLER DETAILS OF THE RESEARCH METHODOLOGY AND HIGHLIGHTS AND HYPOTHESES FROM THE GROUP DISCUSSIONS APPEAR IN PARTS A AND B RESPECTIVELY OF THE APPENDIX. COPIES OF THE MEAT USAGE DIARY AND THE USAGE AND ATTITUDE QUESTIONNAIRE APPEAR AS PARTS C AND D RESPECTIVELY OF THE TECHNICAL APPENDIX.

COMPLETE SETS OF THE VERY EXTENSIVE COMPUTER TABULATIONS HAVE BEEN SUPPLIED ALREADY TO THE ONTARIO MINISTRY OF AGRICULTURE AND FOOD. OF NECESSITY, THE CONTENTS OF THIS REPORT CAN ONLY HIGHLIGHT THE MAIN FINDINGS.

NOTES ON READING THIS REPORT

1. TABLES AND CHARTS REFER TO NATIONAL RESULTS UNLESS OTHERWISE SPECIFIED.

2. TABLES AND CHARTS REFER TO PORK IN ALL ITS FORMS, PROCESSED AND UNPROCESSED, UNLESS OTHERWISE SPECIFIED.

3. THIS REPORT IS BASED ON A PRESENTATION OF THE SURVEY FINDINGS. THE TABLES AND CHARTS GIVEN IN THIS REPORT ARE THE FULL PRESENTATION WHILE THE BLUE DESCRIPTIVE PAGES SUMMARISE THE KEY POINTS ARISING.

2. EXECUTIVE SUMMARY

1. As would be expected, red meat (and primarily beef), dominates white meat and fish/seafood on Canadians' dinner plates. Although the tide is clearly turning, pork producers and marketers are currently working from a position of some weakness.

2. Pork is not pork! The term 'pork' is usually thought to refer just to fresh pork. Bacon and ham - and for that matter other processed pork products - though clearly recognised as all starting with a pig, are really viewed as separate meats, with their own characteristics.

3. When both the fresh and processed forms of the meat are taken into account, consumption of pork in Canadian households is second only to beef, while chicken is in third place.

4. Ontarians show the highest per capita consumption of pork. The lowest per capita consumption of pork is in the Atlantic provinces.

5. Canadians eat almost twice as much processed pork as fresh. In fact, their consumption of processed pork

ALMOST EQUALS THAT OF CHICKEN IN ALL ITS FORMS. FOR BEEF AND CHICKEN, FRESH MEAT IS MORE COMMONLY SERVED THAN PROCESSED.

6. NON-USAGE OF PORK (AS A WHOLE) IS AT A VERY LOW LEVEL. TO ALL INTENTS AND PURPOSES, EVERYONE IS IN THE TARGET MARKET. HOWEVER, IT SHOULD BE POINTED OUT THAT NON-USAGE OF PORK IS HIGHER IN ONTARIO THAN THE REST OF CANADA.

7. GENERALLY, CONSUMERS ARE VERY FAMILIAR WITH THE DIFFERENT CUTS OF MEAT AVAILABLE. FURTHER, THE CUTS THEY USE TEND TO BE VERY SIMILAR WHETHER THEY ARE A HEAVY USER OR A LIGHT USER OF THE MEAT. HEAVY USERS JUST SERVE MORE OFTEN. THIS SITUATION IS EQUALLY THE CASE FOR FRESH PORK AS IT IS FOR THE OTHER MAIN TYPES OF MEAT.

8. DEMOGRAPHIC PROFILES OF HEAVY USERS OF FRESH PORK, BEEF AND POULTRY ARE SIMILAR TO THE PROFILE OF CANADIAN HOUSEHOLDS AS A WHOLE. HEAVY BACON USERS, HOWEVER, TEND TO BE OLDER, WITH A LOWER INCOME AND TO LIVE IN SMALLER COMMUNITIES.

9. THERE IS SOME EVIDENCE, ALBEIT LIMITED, THAT FRESH PORK AND HAM SUFFERS MORE THAN BEEF OR CHICKEN IN TERMS OF REDUCED SUMMER USAGE.

It is fairly widely believe that it is not a good idea to eat pork when the weather is hot.

10. Compared to beef, chicken and fish, fresh pork is served more as an everyday (rather than special occasion) meat. Fresh pork is generally not a food chosen when eating out.

11. Consumers across the country hold very homogeneous views of the different meat types. This constancy of opinion is matched by generally conservative behaviour which sees menu setting and shopping as routine tasks that follow very regular patterns. There is a constant search for variety in meals but this, even when successful, does not upset basic habits. In other words, the main meat types are going to be rotated in some manner, (i.e. some form of pork one day, beef the next, chicken the next etc.) throughout weekly menus with the trimmings, sauces etc. changed.

12. Overall, fresh pork is generally viewed in a fairly positive way. However, it suffers by any comparison with either chicken or beef, which are much more popular meats with their own distinct characteristics.

PORK, BY CONTRAST, OFFERS NOTHING THAT DIFFERENTIATES IT IN A POSITIVE WAY. BEEF IS DISTINGUISHED FOR ITS TASTE AND GENERAL VERSATILITY AND CHICKEN BY ITS REASONABLE PRICE AND NUTRITIONAL, HEALTH-ORIENTED VIRTUES.

13. COMPARED TO THE OTHER MEAT TYPES, FRESH PORK AND HAM WERE DESCRIBED AS:

- LESS HEALTHY/NUTRITIOUS
- LESS VERSATILE/CONVENIENT
- LESS TASTY
- LESS MOIST/TENDER

IT IS THE FIRST TWO AREAS THAT MUST BE OF PRIME CONCERN AS IT WOULD SEEM THAT HEALTH/NUTRITION, VERSATILITY/CONVENIENCE AND PRICE ARE THE THREE MAIN FACTORS DICTATING CONSUMERS' MEAT PURCHASES.

14. FRESH PORK WAS GENERALLY SEEN AS BEING PRICE COMPETITIVE. IT WAS FELT TO BE MORE EXPENSIVE THAN CHICKEN BUT LESS EXPENSIVE THAN BEEF.

15. HOWEVER, FOR HEALTH/NUTRITION FRESH PORK FARED RELATIVELY POORLY IN TERMS OF BEING:

- FATTY
- HIGH IN CHOLESTEROL

FOR VERSATILITY/CONVENIENCE THE MAIN WEAKNESSES OF FRESH PORK INVOLVED:

- NOT AS GOOD FOR LEFTOVERS
- NOT AS GOOD FOR FREEZING
- NOT AS EASY TO 'DRESS UP'

16. ONE FURTHER POTENTIAL NEGATIVE FOR FRESH PORK IS THE WIDESPREAD BELIEF THAT IT HAS TO BE COOKED WELL-DONE. THIS CAN, OF COURSE, ADD TO THE ALREADY EXISTING BELIEF THAT THE MEAT IS HEAVY AND CHEWY.

17. ONTARIANS, WHO ARE THE HEAVIEST FRESH PORK USERS, WHILST HOLDING THE SAME GENERAL VIEWS OF FRESH PORK AND HAM AS THOSE LIVING IN OTHER PARTS OF THE COUNTRY, WERE NEVERTHELESS THE LEAST CRITICAL OF PORK FOR HEALTH AND NUTRITIONAL CONCERNS. THEY ALSO HAD A MORE FAVOURABLE VIEW OF ITS PRICING.

18. IT IS CLEAR THAT WHEN SHOPPING FOR FRESH PORK, CONSUMERS CHECK FOR SPECIALS AND ARE PREPARED TO MAKE SPONTANEOUS PURCHASES IF ATTRACTED BY "SOMETHING LOOKING GOOD" ON THE MEAT COUNTER.

19. Overall, consumers anticipate a decline in their consumption of fresh pork, beef and ham and an increase in their chicken and fish consumption. The anticipated decline in the use of fresh pork comes from both heavy and light pork users, and from all parts of the country except the Atlantic provinces.

20. New product development for both fresh and processed pork products is essential. For fresh pork, boneless products offer the advantages of value and convenience. Of the specific new cuts investigated, the plain (rather than the stuffed) cutlets and steaks were the more enthusiastically received. Flavour is the main basis of appeal for processed pork products.

21. Usage of processed pork products - cold cuts, bacon, sausages and wieners, canned meat - is prevalent across Canada. Canned meat, sausages and wieners are particularly frequently used in Atlantic Canada. Ontario is, on the whole, about average in its usage of processed pork products.

22. For cold cuts, freshly sliced products are used more than vacuum packed products. Ontarians are the heaviest users of cold cuts.

23. BACON IS USED BY CANADIAN HOUSEHOLDS IN ALL DEMOGRAPHIC GROUPINGS, THOUGH 2 PERSON OR LARGER HOUSEHOLDS, AND THOSE UNDER 35, ARE THE MOST LIKELY TO ANTICIPATE AN INCREASE IN THEIR CONSUMPTION. HEALTH CONCERNS, PARTICULARLY FAT AND CHOLESTEROL, ARE BARRIERS TO INCREASED USAGE.

24. GENERALLY, PROMOTION OF PROCESSED PORK PRODUCTS SHOULD BE BASED FIRST ON FLAVOUR ... AND THEN ON PRICE AND BRANDING.

3. RECOMMENDATIONS AND CONCLUSIONS

1. INDUSTRY TRENDS SHOW A DECREASE IN RED MEAT CONSUMPTION IN FAVOUR OF INCREASED USE OF WHITE MEAT AND FISH. THE CLEAR INDICATION IS THAT THIS SHIFT WILL CONTINUE. RED MEAT STILL VERY MUCH DOMINATES, AND IS LIKELY TO CONTINUE TO DO SO FOR THE FORESEEABLE FUTURE. HOWEVER, PORK (AND BEEF AND LAMB) MUST RESPOND IN A SIGNIFICANT MANNER IF THEY ARE TO STAUNCH THE FLOW. IT IS REALISTIC FOR OPIIP TO SET AS ITS GOAL "TO IMPROVE THE PRODUCTIVITY, PROFITABILITY AND COMPETITIVENESS OF ONTARIO PORK PRODUCTS" BUT THIS WILL HAVE TO BE ACHIEVED IN THE FACE OF A DECLINING MARKET SHARE FOR PORK.

2. MOVEMENT IN FAVOUR OF WHITE MEAT HAS BEEN SLOW AND STEADY, RATHER THAN DYNAMIC. THIS IS BOTH REFLECTIVE OF GENERAL CONSUMER BEHAVIOUR (THERE IS ALWAYS RESISTANCE TO CHANGE) AND INDICATIVE OF FAIRLY 'RIGID' VIEWS ABOUT THE DIFFERENT MEAT TYPES AND THEIR ROLE ON THE HOUSEHOLD'S MENU.

3. THE PRIMARY TARGET FOR OPIIP MUST BE THE CONSUMER, THOUGH A CONCENTRATED EFFORT MUST ALSO BE MADE TO GAIN THE SUPPORT OF RETAILERS, THE FOOD SERVICE INDUSTRY, HEALTH PROFESSIONALS AND THE MEDIA.

4. FOR THE CONSUMER, A MAJOR COMMUNICATIONS PROGRAMME IS NECESSARY. THIS SHOULD FOCUS ON FRESH PORK. DUE TO THE 'UNCOMPLICATED' WAY IN WHICH THE MEAT MARKET IS VIEWED, THE MESSAGE NEED NOT BE FRAGMENTED TO SUIT VARIOUS TARGET MARKETS (THIS CONCLUSION RUNS COUNTER TO THE POPULAR PRACTICE IN MANY MARKETS NOWADAYS THOUGH DOES MAKE LIFE EASIER). HOWEVER, THIS STUDY SUGGESTS THAT CANADIANS LIKELY TO BE MOST RESPONSIVE TO SUCH A PROGRAMME ARE THE SEGMENTS WE HAVE IDENTIFIED AS "MODERN" AND "MIDDLE CANADIAN".

THESE SEGMENTS, WHICH INCLUDE BOTH THE UPSCALE AND THOSE OF MORE MODEST MEANS, ALTHOUGH THEY DIVERGE IN THEIR DEGREE OF COOKING INNOVATIVENESS AND THE SPECIFIC ISSUES THAT PARTICULARLY CONCERN THEM (PRICE, DIET, ETC.), ALL DEMONSTRATE AN INTEREST IN FOOD AND FOOD PREPARATION.

BY CONTRAST, THE "TRADITIONAL HOMEMAKER" - OLDER, OF LIMITED MEANS, CONSERVATIVE - AND THE "UNINVOLVED" HOMEMAKER - YOUNG OR OLD, LIKELY LIVING ON THEIR OWN- WILL PROBABLY NOT RESPOND.

THIS STUDY SUGGESTS THAT A FRAMEWORK FOR THIS COMMUNICATIONS PROGRAMME MIGHT BE:

- **RE-EMPHASISE THE POSITIVES**
  - GOOD TASTE
  - GOOD VALUE
  - LOTS OF CUTS AVAILABLE

- **TRY TO OVERCOME THE NEGATIVES**
  - NON-HEALTHY MEAT:
    - FATTY
    - HIGH IN CHOLESTEROL
  - HEAVY MEAT, HARD TO DIGEST
  - NEEDS A LOT OF COOKING

- **PRESENT NEW POSITIVES**
  - NUTRITIOUS
  - MODERN, POPULAR
  - VERSATILE: LOTS OF WAYS TO SERVE/ DRESS-UP
    - GOOD FOR LEFT OVERS
    - GOOD FOR FREEZING

THE FOCUS MUST BE TO PRESENT PORK IN A FAVOURABLE WAY, AND HEIGHTEN CONSUMERS' TOP OF MIND AWARENESS, BUT WITHOUT DRAWING DIRECT COMPARISONS WITH BEEF, CHICKEN AND FISH. IT IS HIGHLY UNLIKELY THAT PORK WILL EVER BE ABLE TO MATCH THESE MEATS FOR THEIR OWN UNIQUE STRENGTHS.

THE CURRENT U.S. ADVERTISING FOR PORK - WHICH WE UNDERSTAND IS BASED ON THE LINE "THE OTHER WHITE MEAT" - WOULD SEEM A GOOD WAY TO HELP ESTABLISH THE HEALTH/NUTRITION MESSAGE.

NEW LEANER ("LIGHTER") CUTS OF PORK - A COMPARISON OF TODAY'S PORK WITH YESTERDAY'S - MAY WELL PROVIDE A STRONG STORY FOR MAKING MANY OF THE KEY COMMUNICATIONS POINTS. BONELESS CUTS ALSO OFFER THE PERCEPTION OF BETTER VALUE FOR MONEY.

SUMMER USAGE OF PORK, POSSIBLY RELATED TO BARBECUING, MIGHT BE A FURTHER STORY WORTH PURSUING. THIS COULD BE LINKED TO THE NEW LEANER CUTS OF PORK AVAILABLE OR, ALTERNATIVELY, USED BY THE MEDIA TIED TO A "HOW TO COOK PORK" STORY.

5. Bacon and ham, like any other processed pork product, would need to be promoted on their own strengths. Both would probably benefit most from 'usage' advertising (i.e. showing the product being cooked, eaten etc.) though there is also a strong story in presenting today's ham as lighter and less salty than yesterday's product.

6. Clearly for processed products like sausages and luncheon meats high profile branding is a key element. The most compelling message to promote this high profile will focus, not on the type of meat, nor on nutritional values or fat content, but on flavour.

7. New product activity, for both fresh and processed pork, should be highlighted. This is a clear way of showing consumers that pork products are very much a part of modern eating trends.

8. Retailers are possibly the second most important group after consumers. The way they display the meat, the specials they offer, any point-of-sale promotions they run (recipes etc.) can all have a distinct influence on consumer perceptions and purchasing habits. Retail level activity must back up the primary communications programme to gain maximum value.

9. HEALTH PROFESSIONALS AND THE MEDIA CAN CLEARLY BE OF VALUE BY SPREADING THE GOOD WORD. THE EMPHASIS SHOULD BE ON:

- NUTRITION
- VERSATILITY
- NEW LEANER CUTS
- HOW TO COOK FOR BEST RESULTS
- RECIPES

10. FINALLY, THE FOOD SERVICE INDUSTRY IS INTERESTING. AT THE MOMENT, PORK (AND HAM AND BACON) ARE UNDERDEVELOPED IN THIS REGARD. THERE IS:

- NO HEAVY FAST FOOD OUTLET USAGE OF PORK AND ITS PRODUCTS (LOOK WHAT CHICKEN MCNUGGETS HAS DONE FOR CHICKEN PRODUCERS)

- LITTLE APPEARANCE OF PORK ON THE MENUS OF BETTER RESTAURANTS

BOTH OF THE ABOVE, THE FORMER IN TERMS OF QUANTITY SALES AND THE LATTER IN TERMS OF IMAGE, IF THEY COULD BE ADDRESSED, MIGHT PROVIDE VERY WORTHWHILE AVENUES FOR THE PORK INDUSTRY.

Table Reference

4. CANADIANS' CONSUMPTION OF MEAT

- THE RESULTS REPORTED IN THIS SECTION REFLECT MEAT USAGE BY INDIVIDUAL CONSUMERS ACROSS CANADA FOR THE WEEK COMMENCING JANUARY 19, 1987. WHILST IN A GENERAL SENSE THIS WEEK WAS CHOSEN TO REPRESENT A 'TYPICAL' WINTER WEEK IN TERMS OF MEAT USAGE, IT MUST OF COURSE BE REMEMBERED THAT A NUMBER OF FACTORS (E.G. INDUSTRY PROMOTIONS, STORE SPECIALS ETC.) COULD HAVE PLAYED A ROLE IN DETERMINING CANADIANS' CONSUMPTION HABITS.

- FURTHER, IT SHOULD BE REMEMBERED THAT NO MEASURE OF INSTITUTIONAL USAGE WAS ATTEMPTED.

- OVERALL, CANADIANS ATE 58,863,000 POUNDS OF MEAT, FISH OR SEAFOOD IN THE WEEK OF JANUARY 19TH, 1987, WITH PORK (IN ALL ITS FORMS) ACCOUNTING FOR 13,810,000 POUNDS. THIS MAKES PORK THE SECOND MOST POPULAR MEAT TYPE. BEEF WAS VERY CLEARLY THE MOST POPULAR MEAT (25,223,000 LBS) WITH CHICKEN (10,024,000LBS) PLACING THIRD BEHIND PORK. T1 T2

Table Reference

- Ontarians proved to have a relatively low per capita consumption of meat. Residents of Quebec had the highest meat consumption level with, interestingly, those living in the western provinces showing marginally the lowest per capita meat consumption. T3

- Despite the fact that Ontarians have a relatively low per capita consumption of meat, they still ate a lot of it during the week of January 19, 1987 - 21,455,000 pounds! And pork (all forms) was particularly important in Ontario. In fact, Ontarians had the highest per capita consumption of pork. T4 The lowest consumption of pork was in Atlantic Canada. It must be remembered, of course, that special promotions etc. could have had an influence on the weekly meat eating habits reported. Nevertheless, the importance of pork in Canadians' diets is very clear. T5 Indeed, 90% of Canadian households served pork during the week of January 19th, 1987. This very high level of usage - exceeded only by beef - was apparent across the country. T6, T7

- Processed pork was much more widely used than
  fresh pork. This is the reverse of the T8
  position for beef and chicken where the fresh
  form of the meat proved more popular. T10
  Indeed, fresh pork, bacon and ham were
  individually all used in very much the same
  number of households during the week of
  January 19, 1987 (53%, 52% and 50%
  respectively). T9

- Compared to the rest of Canada, Ontarians were slightly more likely to have eaten fresh pork and bacon but were definitely less likely to have eaten ham.

- Overall, in the week of January 19, 1987, for Canada as a whole, pork (all forms) accounted for:

  ... 32% of all meat servings
  ... 23% of all meat volume T11

  In Ontario, pork accounted for:

  ... 34% of all meat servings
  ... 25% of all meat volume T12

Table Reference

- THE MAIN REASON WHY PORK WAS RESPONSIBLE FOR A CONSIDERABLY GREATER PROPORTION OF SERVINGS THAN VOLUME WAS BACON. BACON ACCOUNTED FOR 25% OF ALL PORK SERVINGS BUT ONLY 7% OF VOLUME. THE AVERAGE SERVING OF BACON IS, OF COURSE, RELATIVELY SMALL. T13

CANADIANS EAT A LOT OF MEAT!

IN THE WEEK OF JANUARY 19, 1987, 24,943,000 CANADIANS ATE . . .

. . . 58,863,000 POUNDS OF MEAT, FISH OR SEAFOOD

- 25,223,000 POUNDS OF BEEF
- 10,024,000 POUNDS OF CHICKEN
- 4,622,000 POUNDS OF FISH
- 1,800,000 POUNDS OF TURKEY
- 1,027,000 POUNDS OF SEAFOOD
- 1,016,000 POUNDS OF VEAL

AND

- 537,000 POUNDS OF LAMB
- 63,000 POUNDS OF DUCK
- 298,000 POUNDS OF MOOSE
- 15,000 POUNDS OF FROG'S LEGS

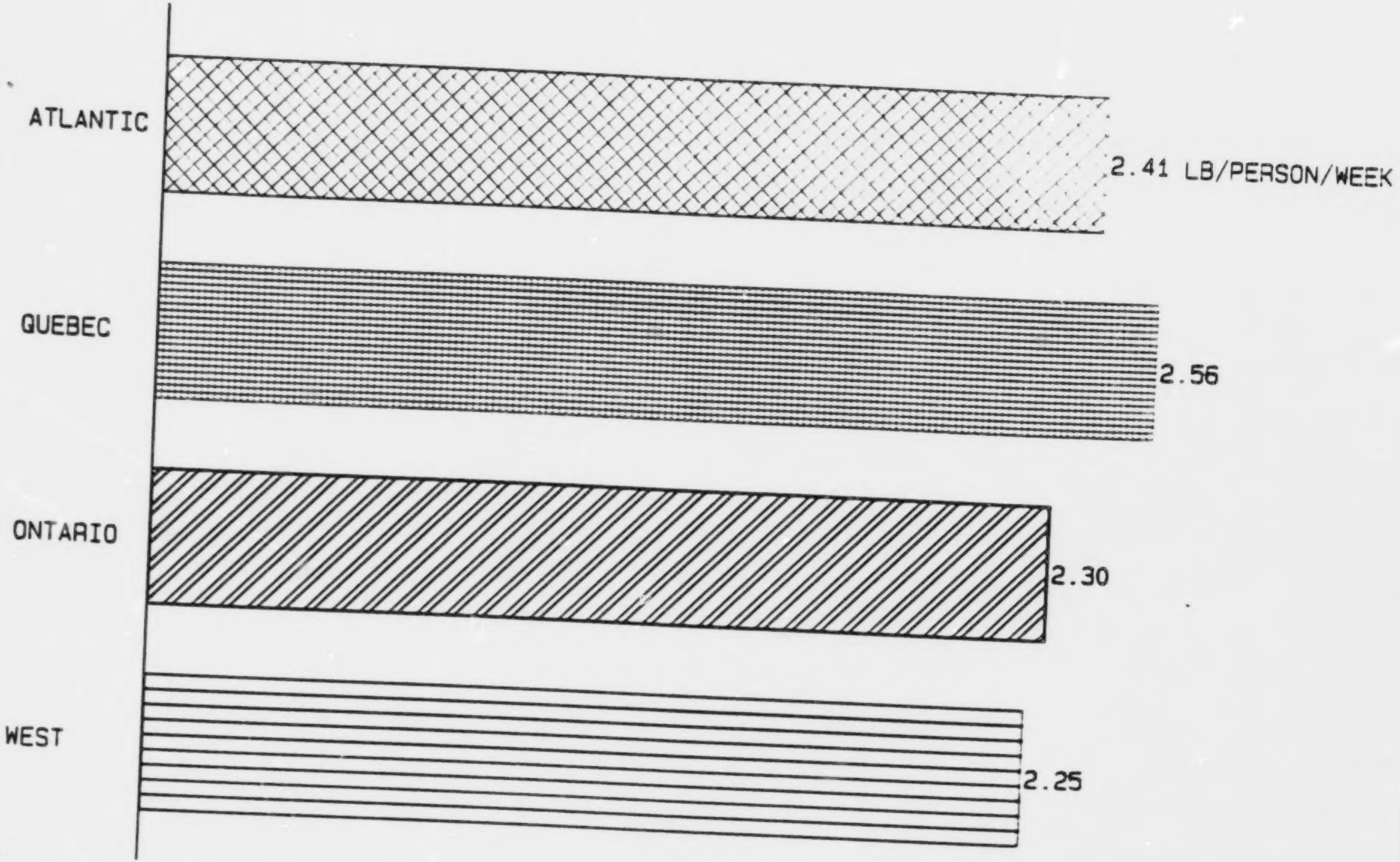
NOTE: FIGURES CALCULATED BY GROSSING UP CONSUMPTION DATA FROM USAGE DIARY (N.B. INSTITUTIONAL USE NOT MEASURED)

. . . AND 13,810,000 POUNDS OF PORK (INCLUDING BACON/HAM)

- 4,828,000 POUNDS OF FRESH PORK
    - 1,221,000 POUNDS OF FRESH PORK ROASTS
    - 2,370,000 POUNDS OF CHOPS/STEAKS/CUTLETS
    - 467,000 POUNDS OF RIBS
- 8,982,000 POUNDS OF PROCESSED PORK
    - 928,000 POUNDS OF BACON
    - 3,633,000 POUNDS OF HAM
    - 882,000 POUNDS OF SAUSAGE
    - 2,180,000 POUNDS OF LUNCHEON MEAT

NOTE: FIGURES CALCULATED BY GROSSING UP CONSUMPTION DATA FROM USAGE DIARY (N.B. INSTITUTIONAL USE NOT MEASURED)

ONTARIANS HAVE THE SECOND LOWEST PER CAPITA CONSUMPTION OF MEAT
(INC. FISH/SEAFOOD)



ONTARIANS ATE:

. . . 21,455,000 POUNDS IN THE WEEK OF JANUARY 19, 1987

- 8,870,000 POUNDS OF BEEF
- 3,788,000 POUNDS OF CHICKEN
- 682,000 POUNDS OF TURKEY
- 1,585,000 POUNDS OF FISH
- 347,000 POUNDS OF SEAFOOD

AND

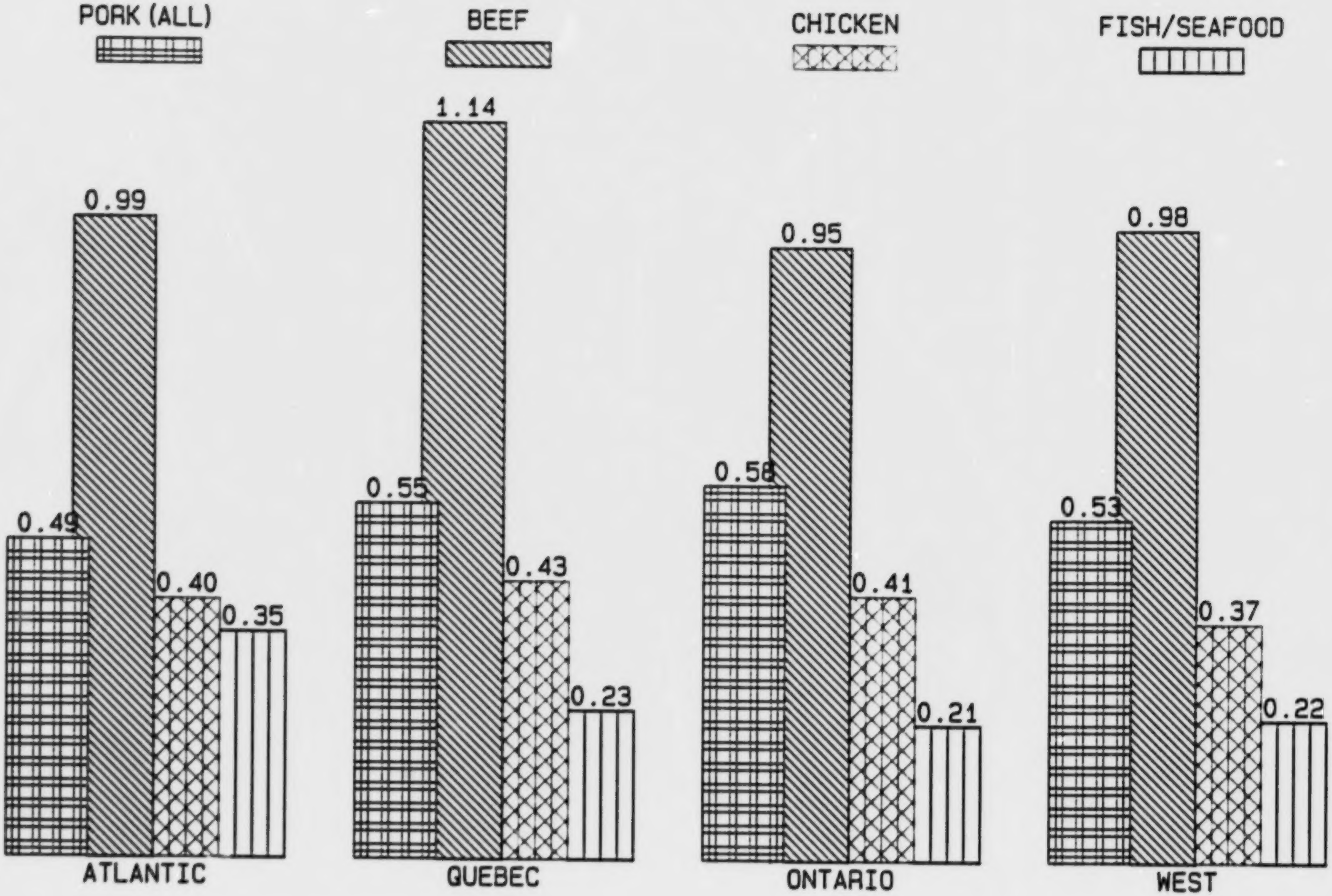
- 5,434,000 POUNDS OF PORK

OF WHICH

- 1,917,000 POUNDS WAS FRESH PORK
- 3,517,000 POUNDS WAS PROCESSED PORK
  - 367,000 POUNDS OF BACON
  - 1,250,000 POUNDS OF HAM

ONTARIANS HAVE THE HIGHEST PER CAPITA CONSUMPTION OF PORK

(MEASURED IN LB/PERSON/WEEK)



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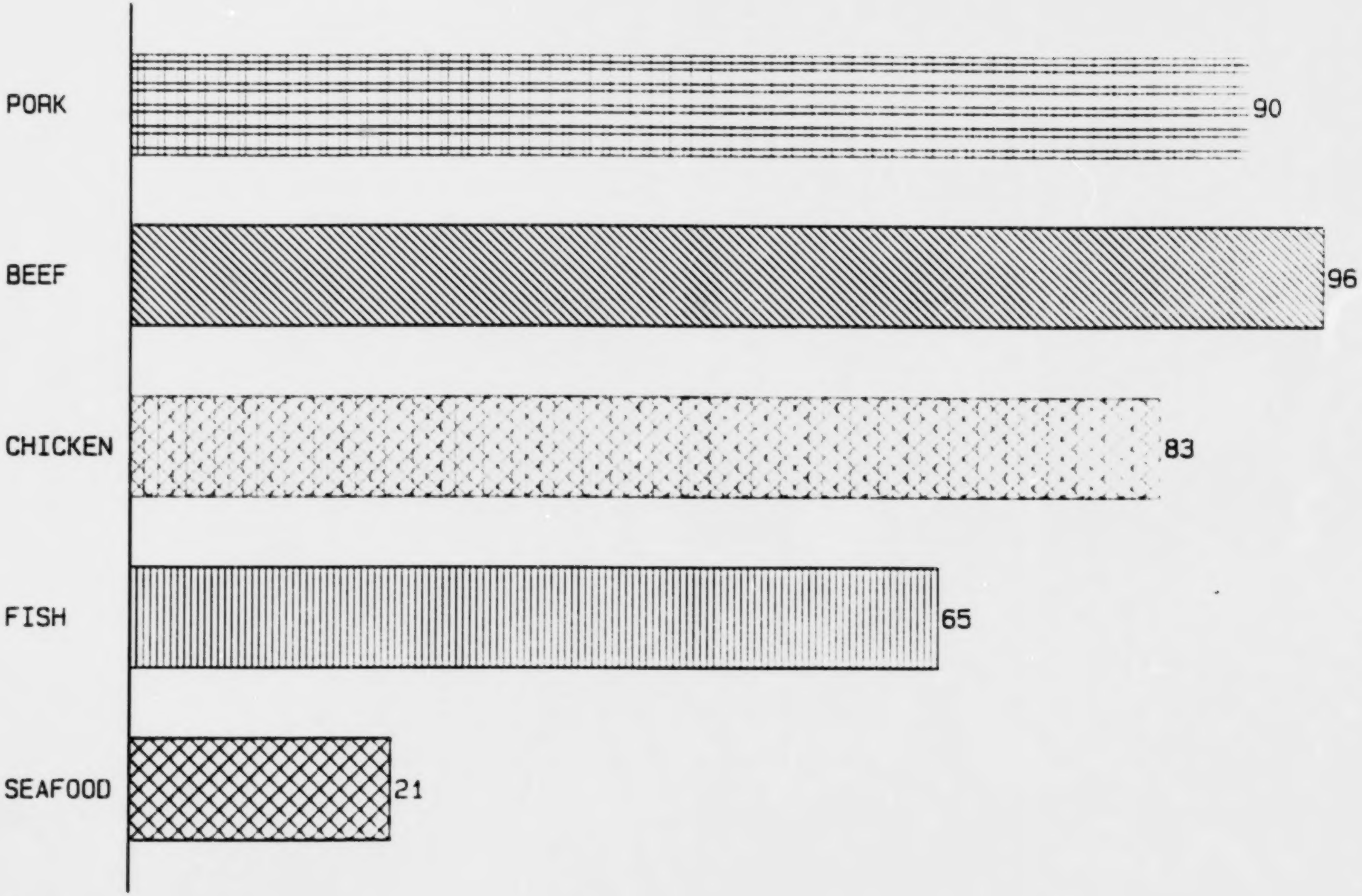
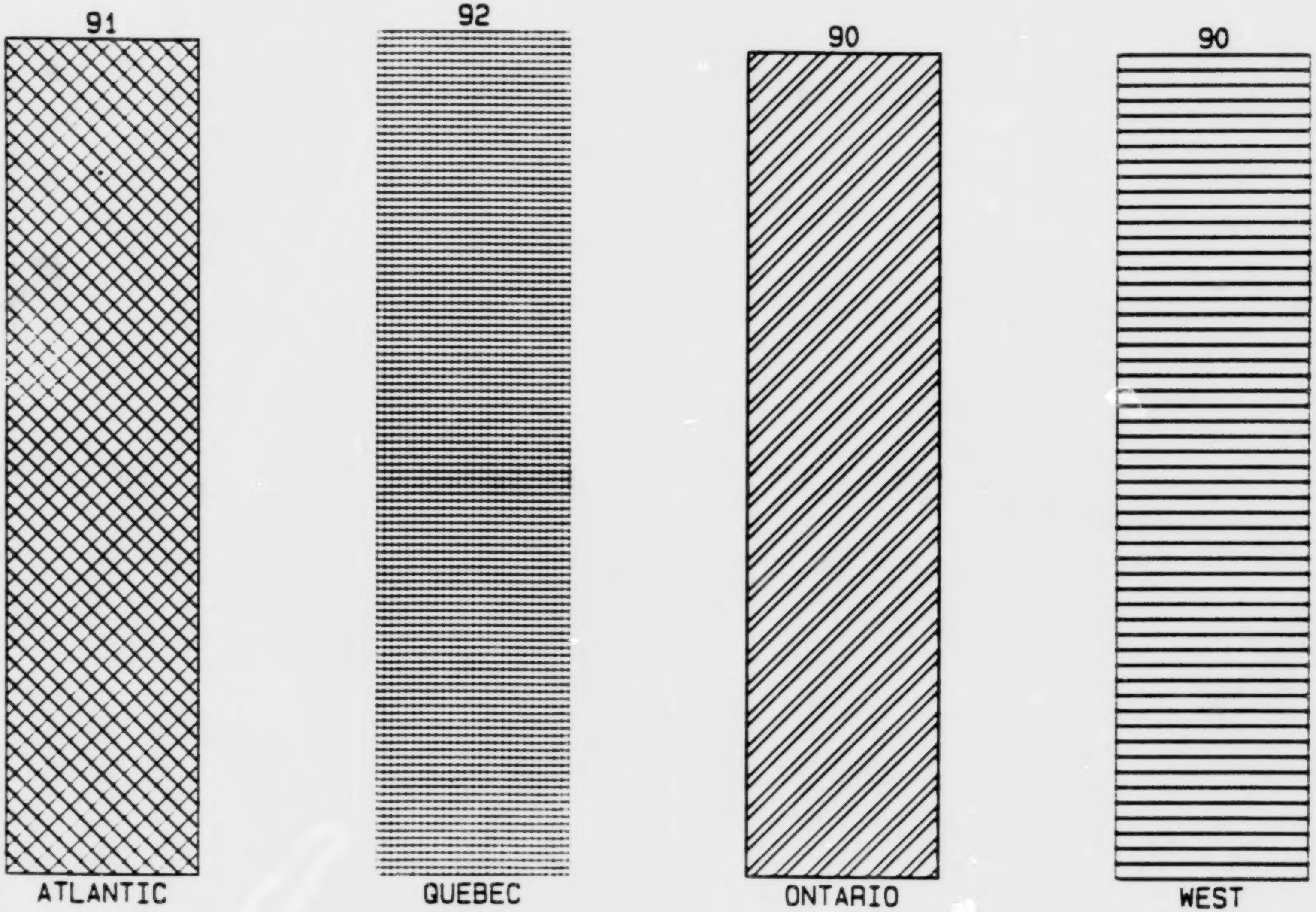
MEAT SERVING IN THE WEEK OF JANUARY 19–25, 1987

% OF HOUSEHOLDS EATING

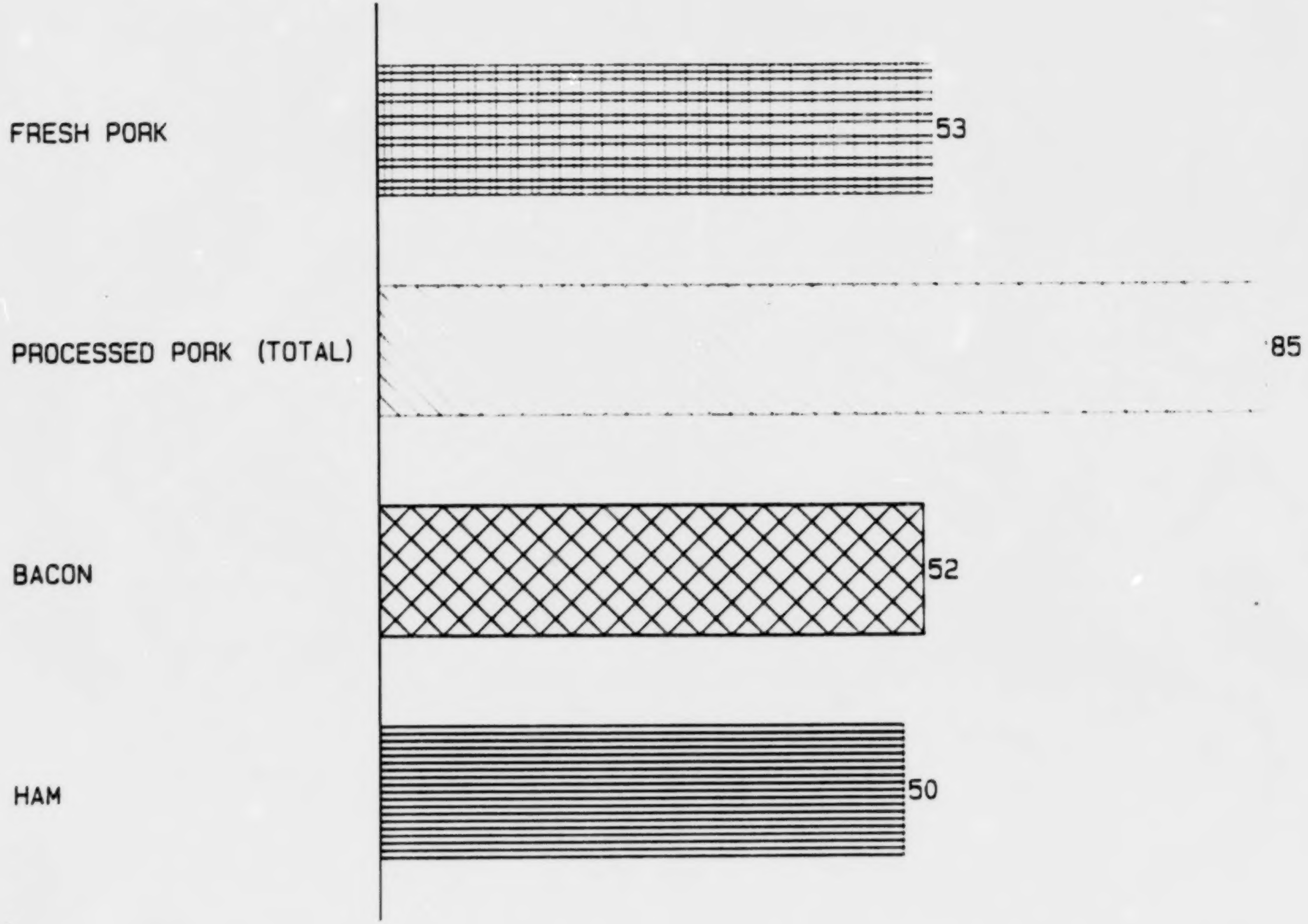


PORK SERVING BY PROVINCE

% OF HOUSEHOLDS

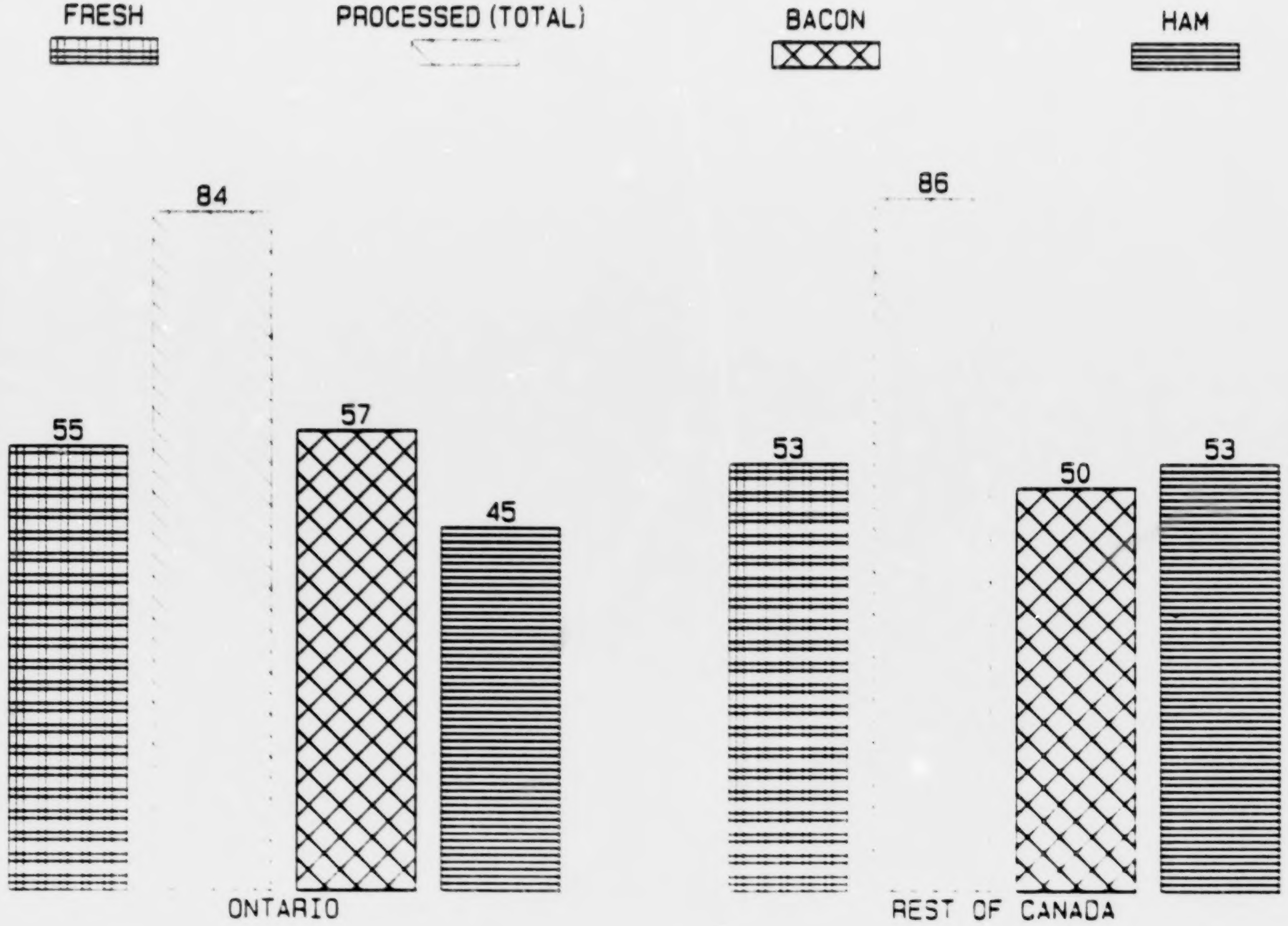


TYPES OF PORK EATEN
% OF HOUSEHOLDS



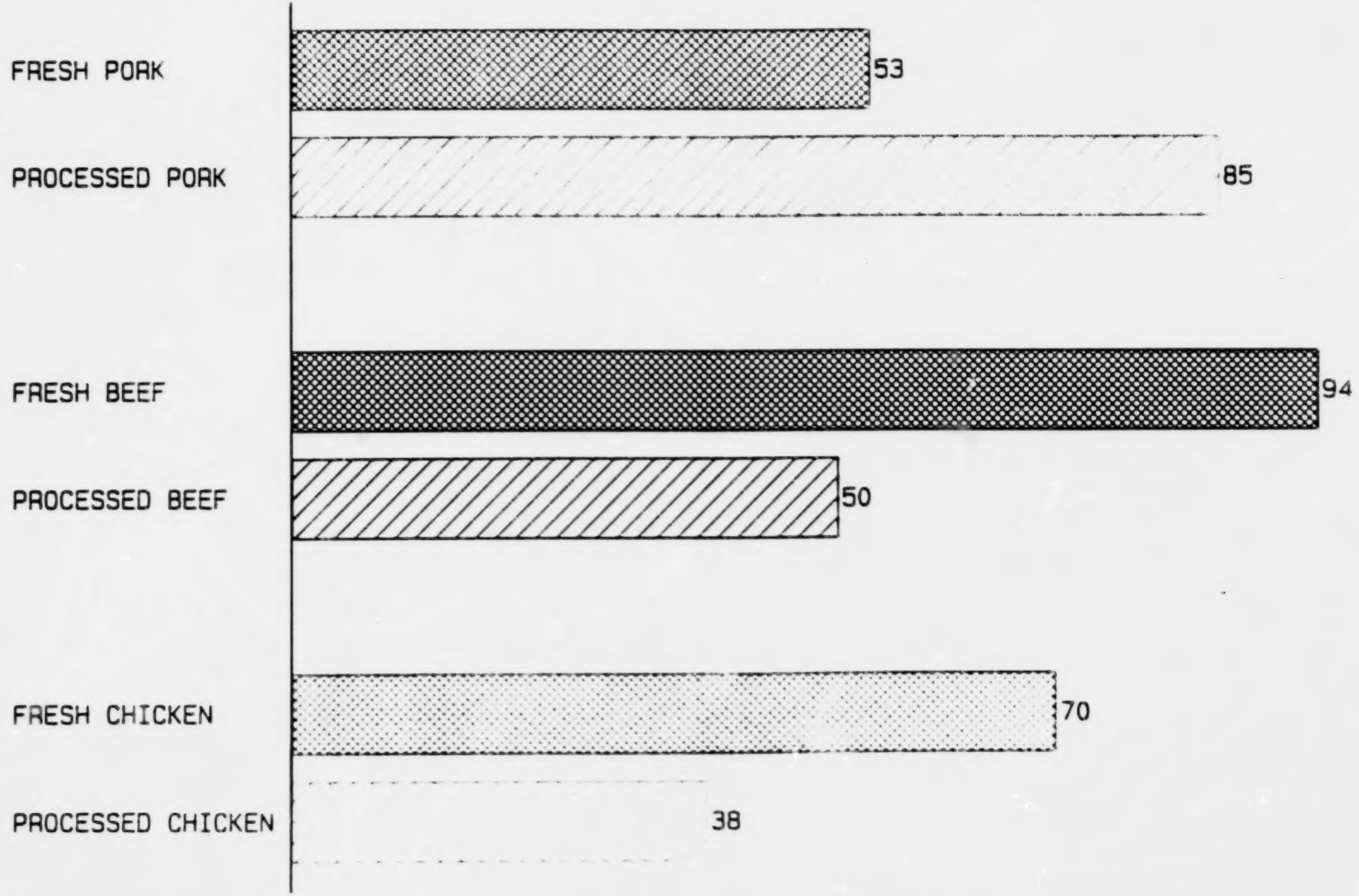
TYPES OF PORK EATEN

ONTARIO cf. REST OF CANADA

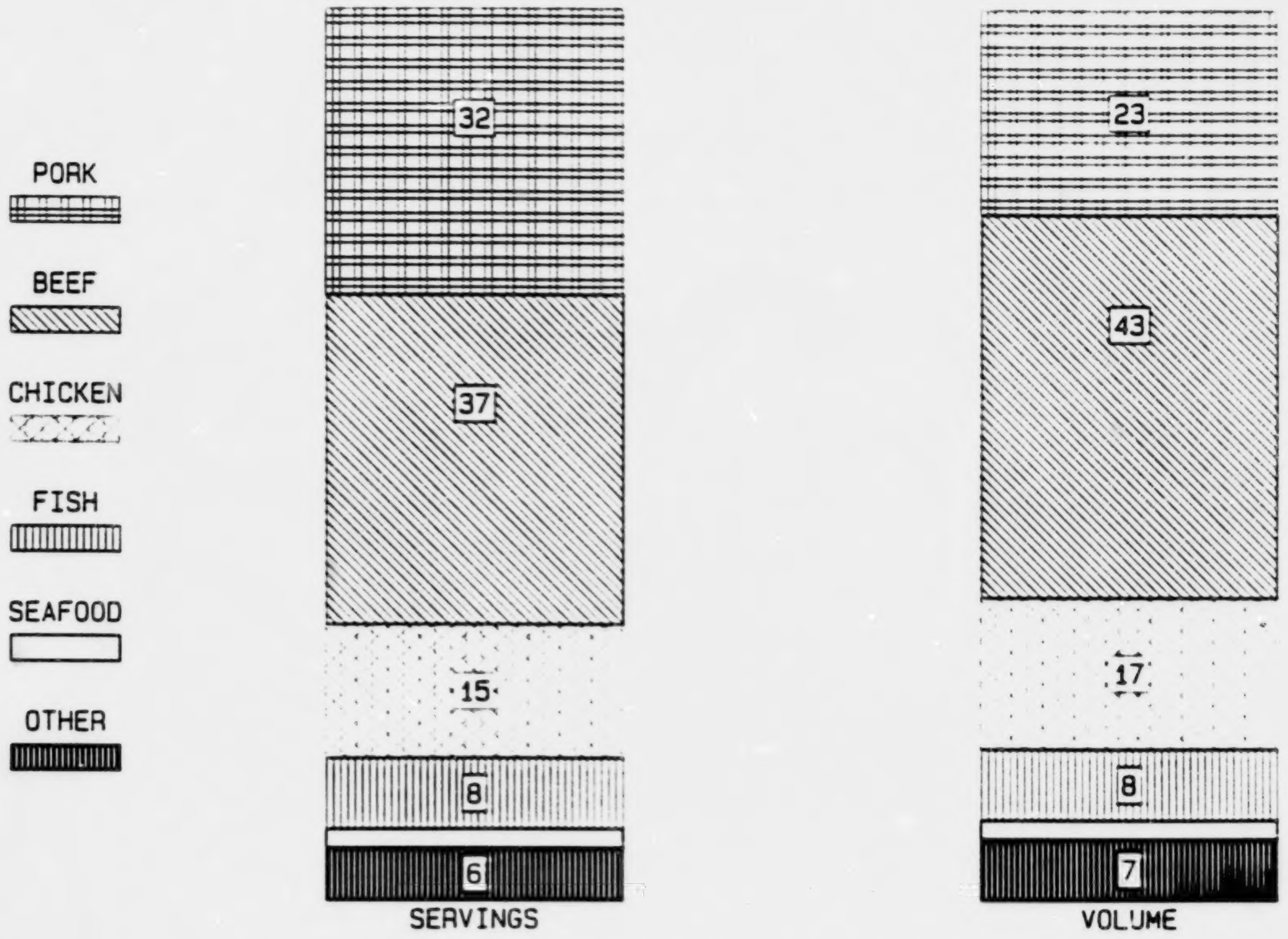


FRESH & PROCESSED MEAT

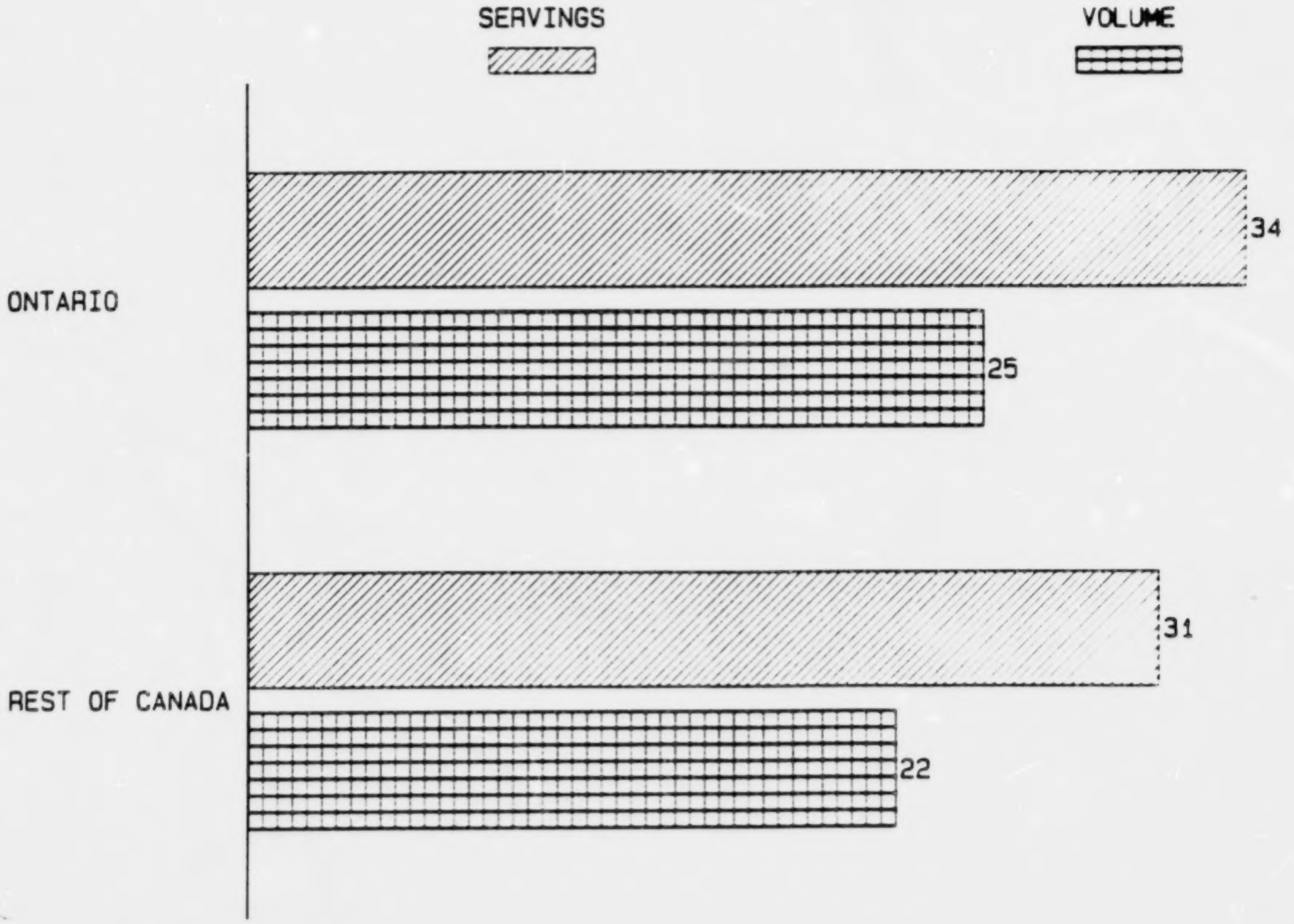
% OF HOUSEHOLDS EATING



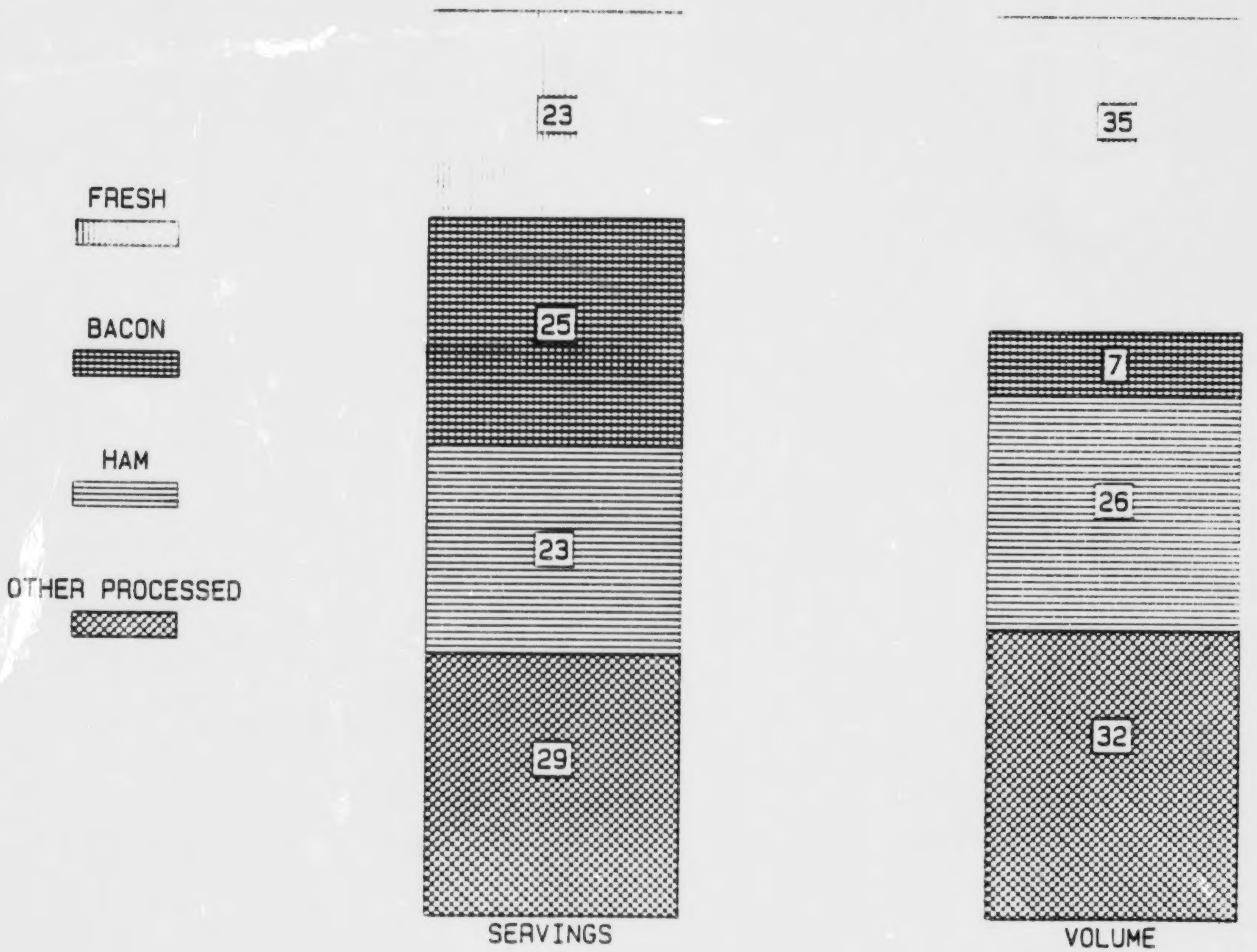
THE PLACE OF PORK (INC. BACON/HAM)
IN THE EATING PATTERNS OF CANADIANS



PORK(INC. BACON/HAM) - ONTARIO cf. REST OF CANADA



THE TYPE OF PORK THAT CANADIANS EAT



5. PORK USAGE

Table Reference

- Only 712,000 Canadians do not eat any kind of pork for religious, moral or medical reasons. This is only 2.8% of the Canadian population and compares with 1.8% who do not eat beef and 1.9% who do not eat fish. The Ontario population, however, contains a greater proportion who do not eat pork (3.0%) than is true for the rest of Canada (1.7%). T14 T15

- Generally, all Canadian homemakers were very familiar with fresh pork and ham, and with the wide range of cuts that are available for each of these meat types. Beef and chicken were, however, the meats homemakers were most likely to have in their homes at the time of interview. T16,17

- An examination of fresh pork serving by weight of usage shows, very interestingly, that heavy, medium and light pork users all serve the same types and cuts of fresh pork, to the same relative extent. The only real difference is that heavy users serve more often. T20

GENERALLY, LOIN AND SHOULDER BUTT CHOPS AND A
SHOULDER ROAST WERE THE MOST POPULAR FRESH
CUTS OF PORK, WHILST SIDE BACON, SLICED HAM T21
(SANDWICH) AND SLICED LUNCHEON MEATS WERE THE T22
MOST POPULAR PROCESSED CUTS.

- THE DEMOGRAPHIC PROFILES OF HEAVY PORK USERS (NOT INCLUDING BACON/HAM), HEAVY BEEF USERS AND HEAVY POULTRY USERS VERY MUCH MATCH THE PROFILE OF CANADIAN HOUSEHOLDS AS A WHOLE FOR:

  - AGE (OF HEAD OF HOUSEHOLD)
  - PRESENCE OF CHILDREN
  - HOUSEHOLD INCOME
  - CITY SIZE.

  THE ONLY NOTEWORTHY VARIATION WAS THAT HEAVY
  PORK USERS WERE LESS LIKELY THAN THE OTHERS
  TO BE FOUND IN THE LARGEST CITIES T19
  (POPULATIONS OF OVER 1M).

Table
Reference

- HEAVY USERS OF BACON ARE DEFINITELY SKEWED TOWARDS HOUSEHOLDS THAT:
  - ARE OLDER (55+ YEARS), AND YOUNGER HOUSEHOLDS WITH CHILDREN ARE PARTICULARLY UNLIKELY TO BE HEAVY USERS
  - HAVE A LOWER INCOME
  - ARE IN SMALLER COMMUNITIES (UP TO 99,999 IN POPULATION). T19

- FROM A SINGLE STUDY COMPLETED IN JANUARY/FEBRUARY, IT IS, OF COURSE, NOT POSSIBLE TO MAKE DEFINITE COMMENTS ABOUT SEASONAL PATTERNS IN MEAT USAGE. NEVERTHELESS, IT IS REASONABLE TO ASSUME THAT THESE EXIST AND, BASED ON HOMEMAKERS' PERCEPTIONS, IT DOES SEEM - PARTICULARLY IN ONTARIO - AS IF PORK AND HAM ARE MORE VULNERABLE TO REDUCED USAGE IN THE SUMMER THAN BEEF OR CHICKEN.

- GENERALLY, FRESH PORK WAS SERVED MORE ON WEEKDAYS (AS OPPOSED TO WEEKENDS) THAN WAS BEEF OR CHICKEN. THIS WAS EQUALLY TRUE ON A CUT BY CUT BASIS AS WELL AS IN TOTAL. T24,T25

Table Reference

- ON THE OTHER HAND, PROCESSED PORK WAS MORE COMMONLY SERVED ON WEEKENDS THAN PROCESSED BEEF OR CHICKEN. THIS FINDING IS, OF COURSE, MAINLY ACCOUNTED FOR BY THE HEAVY WEEKEND USE OF BACON. T26,T27

- THE IMPLICATION OF THIS EXTRA WEIGHT OF WEEKDAY SERVING OF FRESH PORK IS THAT IT IS LESS 'SPECIAL' THAN FRESH BEEF OR CHICKEN. THIS WOULD SEEM TO BE CONFIRMED BY THE FACT THAT ONTARIANS LARGELY DID NOT SEE PORK AS A MEAT THEY LIKED TO EAT MORE OUT OF HOME THAN IN HOME, (T28) AND ALSO BY THE LESSER SPECIAL OCCASION SERVING OF FRESH PORK. (T29) FOR OUT OF HOME EATING, IT SEEMS THAT FRESH PORK DOES NOT OFFER ANYTHING TO ENCOURAGE CANADIANS IN THIS RESPECT. FOR THE OTHER MAIN MEAT TYPES, HOWEVER, RESTAURANTS ETC. WERE ABLE TO TEMPT PATRONS:

  - BEEF: "LIKE TO HAVE STEAK WHEN OUT"
    "SPECIAL"

  - FISH: "DIFFICULT TO COOK AT HOME"

Table
Reference

- CHICKEN: "TASTES BETTER" (IN RELATION TO SWISS CHALET ETC.)
  "GOOD VALUE"

- OVERALL, ONLY 2% OF FRESH PORK USAGE IN ONTARIO WAS ACCOUNTED FOR BY RESTAURANT EATING IN THE WEEK OF JANUARY 19, 1987. THIS COMPARES TO 8% OF FRESH BEEF USAGE AND 9% FOR FRESH CHICKEN. THE SAME GENERAL PICTURE IS TRUE FOR THE REST OF CANADA. T30,T31

- BACON ALSO FOUND RELATIVELY LITTLE OF ITS TOTAL USAGE OUTSIDE OF THE HOME BUT FOR HAM, 26% OF ITS USAGE WAS AT WORK/SCHOOL (IN LUNCHES ETC.) T32

NON-USAGE OF PORK

OF 24,943,000 CANADIANS ONLY:

... 712,000, OR 2.9%, DO NOT EAT PORK IN ANY OF ITS FRESH OR PROCESSED FORMS

BY COMPARISON:

... 459,000, OR 1.8%, DO NOT EAT BEEF

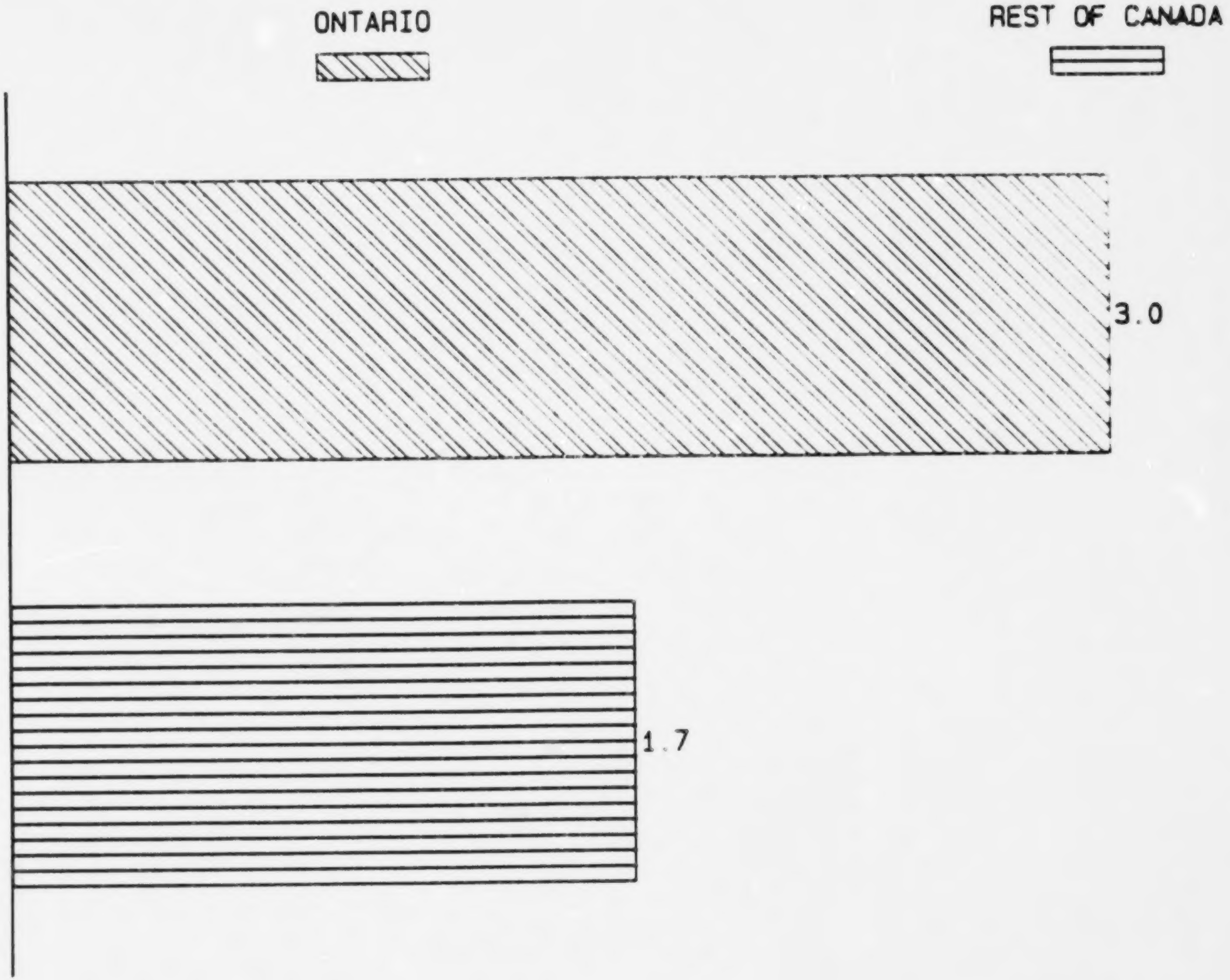
... 381,000, OR 1.5%, DO NOT EAT CHICKEN

... 478,000, OR 1.9%, DO NOT EAT FISH

... 457,000, OR 1.8%, DO NOT EAT SHELLFISH

BUT ONTARIANS ARE THE MOST LIKELY NOT TO EAT PORK(INC. BACON/HAM)

% OF HOUSEHOLDS



SERVING HISTORY AND PRESENCE IN HOME

	EVER SERVED (1001) %	AT HOME NOW (1001) %
FRESH PORK	98	62
BEEF	100	89
CHICKEN	100	73
FISH	95	56
HAM	93	38
TURKEY	92	22
SEAFOOD	77	23
VEAL	64	16
LAMB	43	9

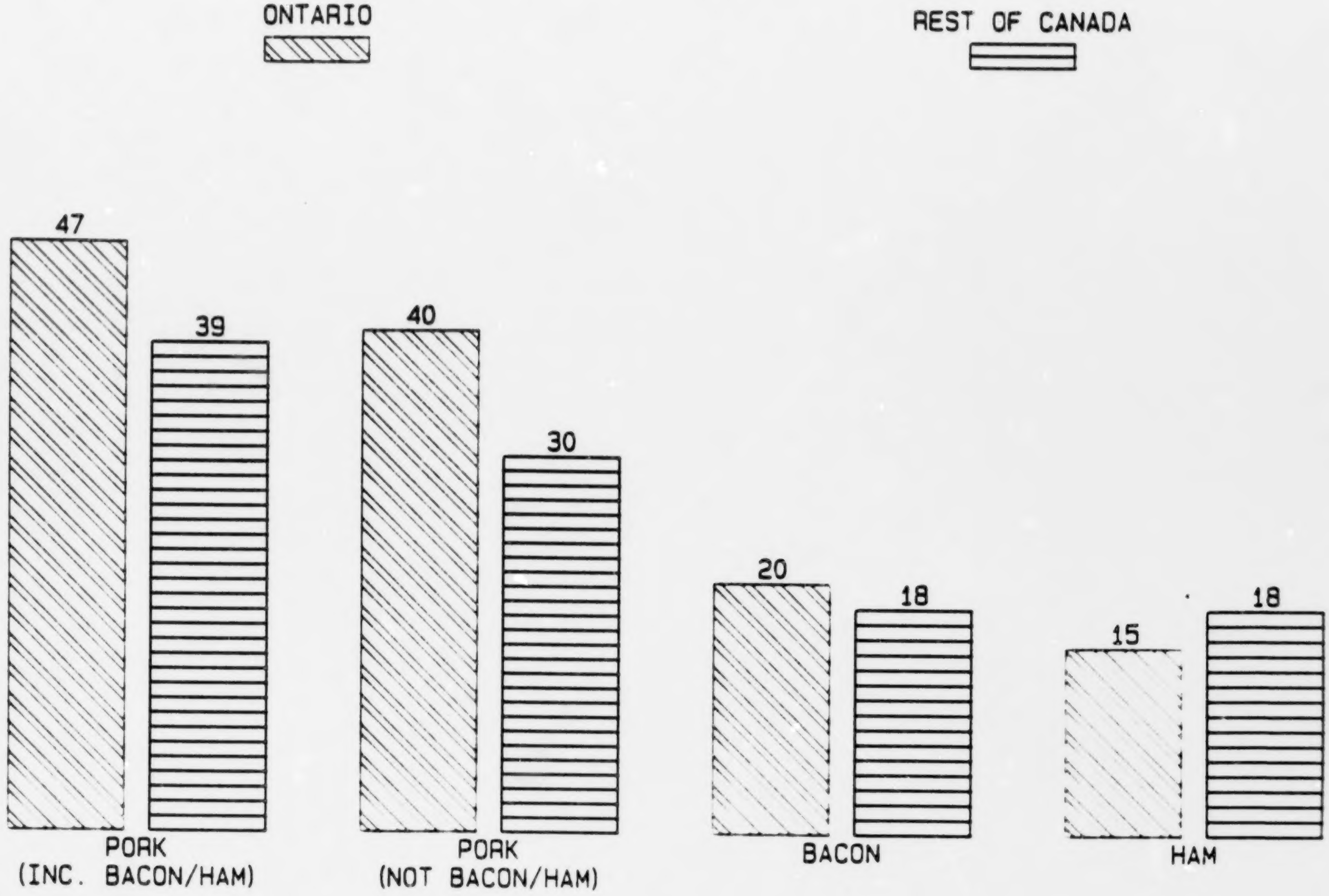
T17

PORK AND HAM CUTS: AWARENESS AND FAMILIARITY

	ONTARIO		REST OF CANADA	
	AWARE -NESS	EVER SERVED	AWARE -NESS	EVER SERVED
	(400)	(400)	(601)	(601)
	%	%	%	%
PORK				
PORK LOIN ROAST	99	76	98	73
PORK SHOULDER ROAST	98	62	98	57
PORK LEG ROAST	93	37	91	38
PORK CROWN RIB	80	20	78	22
PORK LOIN CHOPS	100	93	99	91
SHOULDER BUTT CHOPS	94	55	83	35
BREADED PORK CUTLETS	94	37	91	38
BUTTERFLY CHOPS	90	53	83	45
PORK LOIN STEAK	81	25	92	40
PORK LEG STEAK	69	9	82	21
PORK RIBS	99	74	97	62
PORK TENDERLOIN	99	62	96	55
GROUND PORK	97	54	97	60
ORGANS, HEART, LIVER, ETC.	94	19	94	23
STEWING PORK	82	14	92	30
CUBES OF PORK	77	19	88	29
HAM				
HAM, WITH OR WITHOUT BONE	100	85	100	92
HAM STEAK	99	58	98	65
SHOULDER/PICNIC	97	62	96	59
COTTAGE ROLL	95	49	88	42

HEAVY USERS BY MEAT TYPE

% OF HOUSEHOLDS



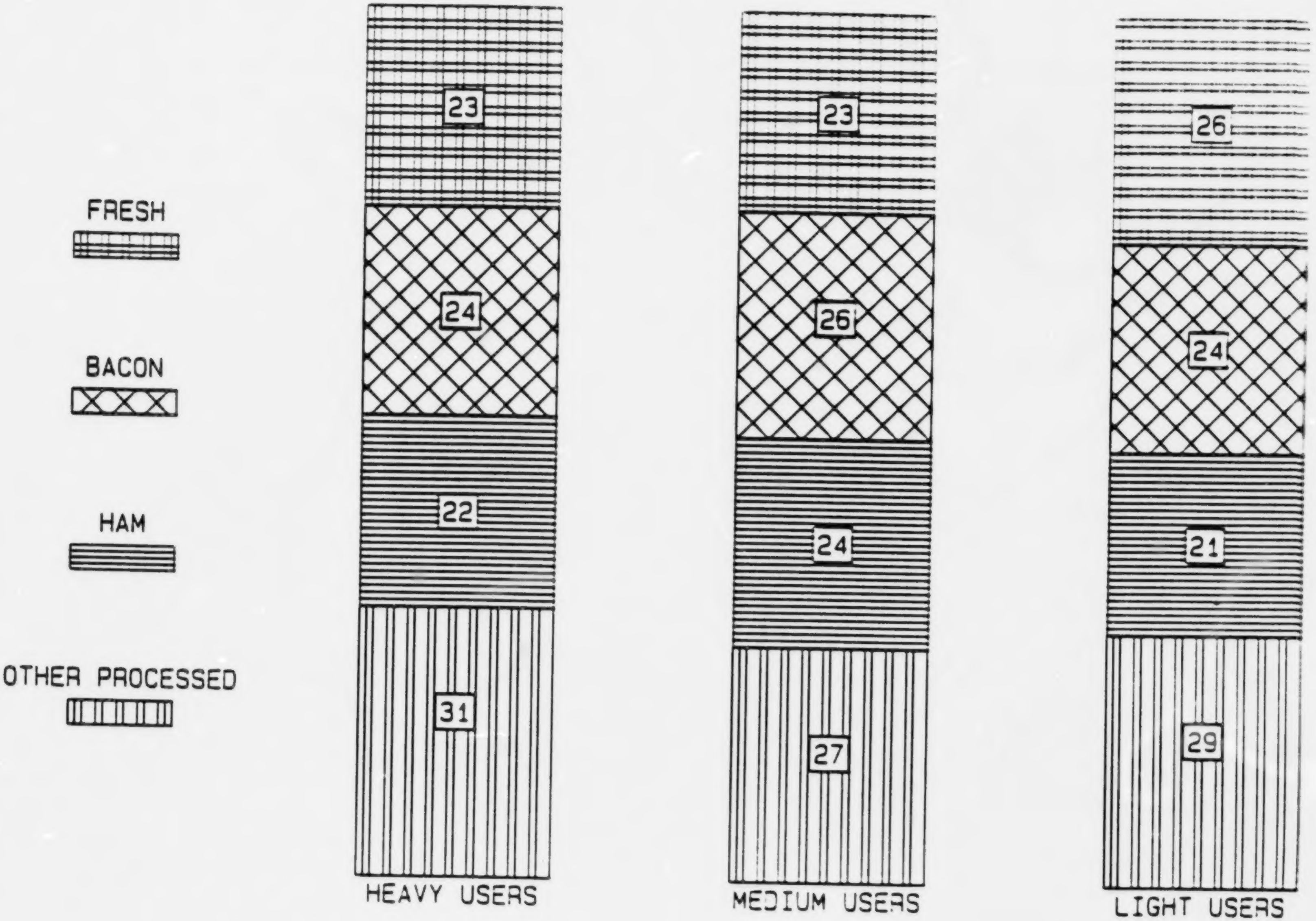
WHO IS A HEAVY USER?

	PORK (NOT BACON/ HAM)	BACON	HAM	BEEF	POULTRY	FISH/ SEAFOOD
	%	%	%	%	%	%
AGE/CHILDREN						
UP TO 34 - NO CHILD	7	7	8	9	7	9
UP TO 34 - CHILD	25	㉑	23	27	27	⑮
35 - 44 - NO CHILD	3	5	5	3	4	6
35 - 44 - CHILD	25	⑭	22	23	20	⑯
45 - 54 - NO CHILD	8	11	9	7	9	13
45 - 54 - CHILD	5	6	7	7	6	3
55+	27	$\boxed{35}$	27	23	27	$\boxed{38}$
HOUSEHOLD INCOME						
UP TO $24,999	42	$\boxed{47}$	42	39	44	42
$25,000 - $34,999	22	19	23	22	20	23
$35,000 - $44,999	19	15	18	18	19	13
$45,000 +	16	18	18	$\boxed{21}$	17	$\boxed{21}$
CITY SIZE						
UP TO 99,999	44	$\boxed{55}$	42	43	41	㊱
100,000 - 1,000,000	$\boxed{34}$	㉓	28	28	27	28
OVER 1,000,000	㉒	㉒	30	29	32	$\boxed{36}$

○ = RELATIVELY LOW

□ = RELATIVELY HIGH

SHARE OF PORK SERVINGS



T21

MOST POPULAR PORK CUTS

TOP 10 FRESH CUTS

ONTARIO	CANADA	HEAVY USERS	MEDIUM USERS	LIGHT USERS
1. LOIN CHOPS	1. LOIN CHOPS	1	1	1
2. SHOULDER BUTT CHOPS	2. SHOULDER ROAST	2	2	4
3. SHOULDER ROAST	3. SHOULDER BUTT CHOPS	3	5	2
4. BUTTERLY CHOPS	4. GROUND PORK	4	3	5
5. LOIN UNSTUFFED ROAST	5. BUTTERFLY CHOPS	8	4	8
6. SIDE RIBS	6. LOIN UNSTUFFED ROAST	5	6	3
7. LIVER	7. LIVER	7	7	6
8. BREADED PORK CUTLETS	8. SIDE RIBS	6	10	7
9. GROUND PORK	9. BREADED PORK CUTLETS	9	11	15
10. BACK RIBS	10. BACK RIBS	14	12	14

NOTE: CHART SHOWS RELATIVE RANKING OF EACH CUT.

MOST POPULAR PORK CUTS

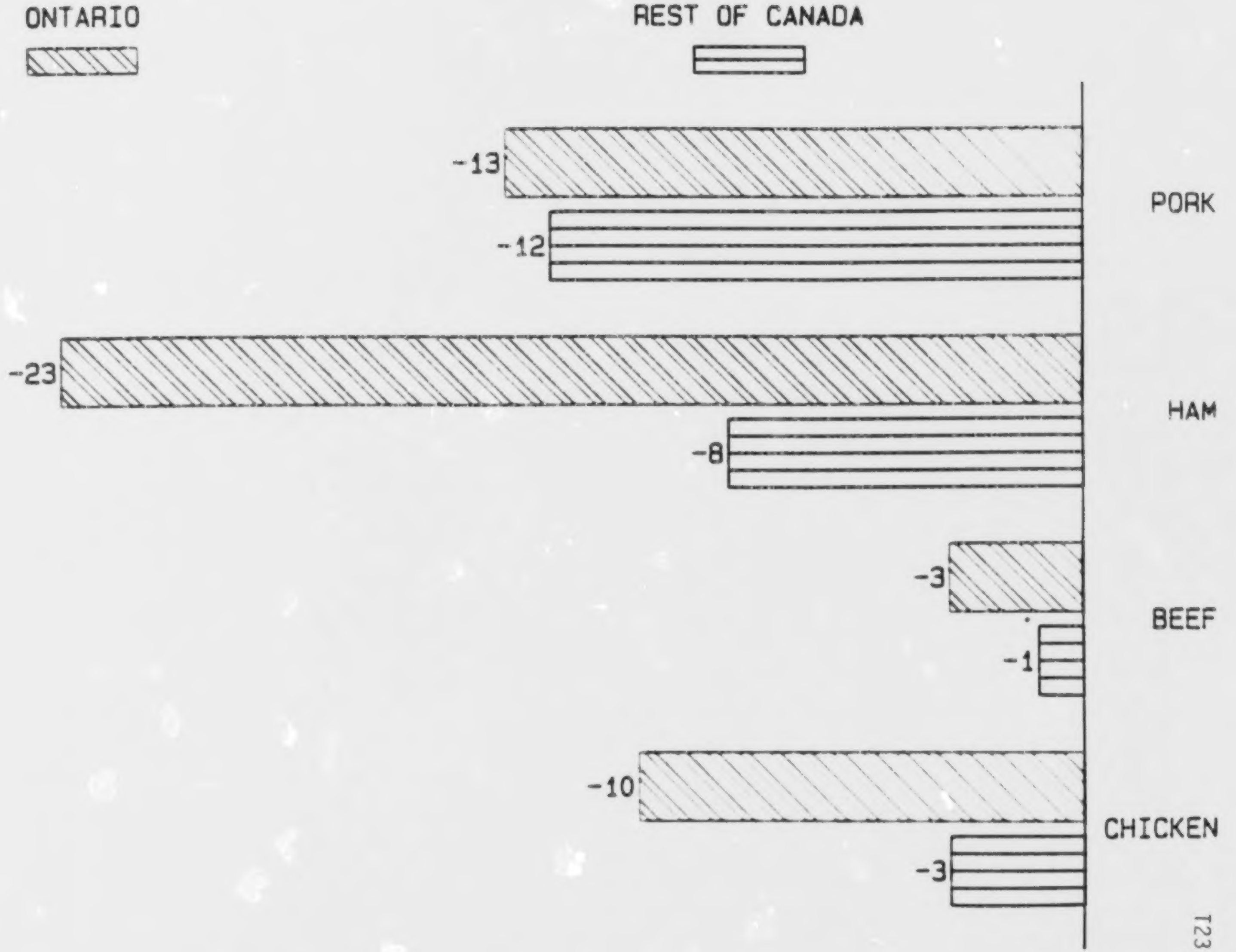
TOP 10 PROCESSED CUTS

ONTARIO	CANADA	HEAVY USERS	MEDIUM USERS	LIGHT USERS
1. SIDE BACON	1. SIDE BACON	1	1	1
2. SLICED HAM (SANDWICH)	2. SLICED HAM (SANDWICH)	2	2	2
3. SLICED LUNCHEON MEAT (COLD CUTS)	3. SLICED LUNCHEON MEAT (COLD CUTS)	5	3	4
4. PURE PORK SAUSAGE	4. PURE PORK SAUSAGE	7	4	3
5. PORK WIENERS	5. PORK WIENERS	6	5	5
6. BONELESS HAM	6. OTHER FRESH SAUSAGE (NOT PURE PORK)	3	6	8
7. OTHER FRESH SAUSAGE (NOT PURE PORK)	7. CURED SMOKED SAUSAGE	4	11	6
8. CURED SMOKED SAUSAGE	8. BONELESS HAM	8	8	7
9. BACK BACON	9. HAM STEAK	10	7	10
10. PEAMEAL BACON	10. BACK BACON	11	9	9

NOTE: CHART SHOWS RELATIVE RANKING OF EACH CUT.

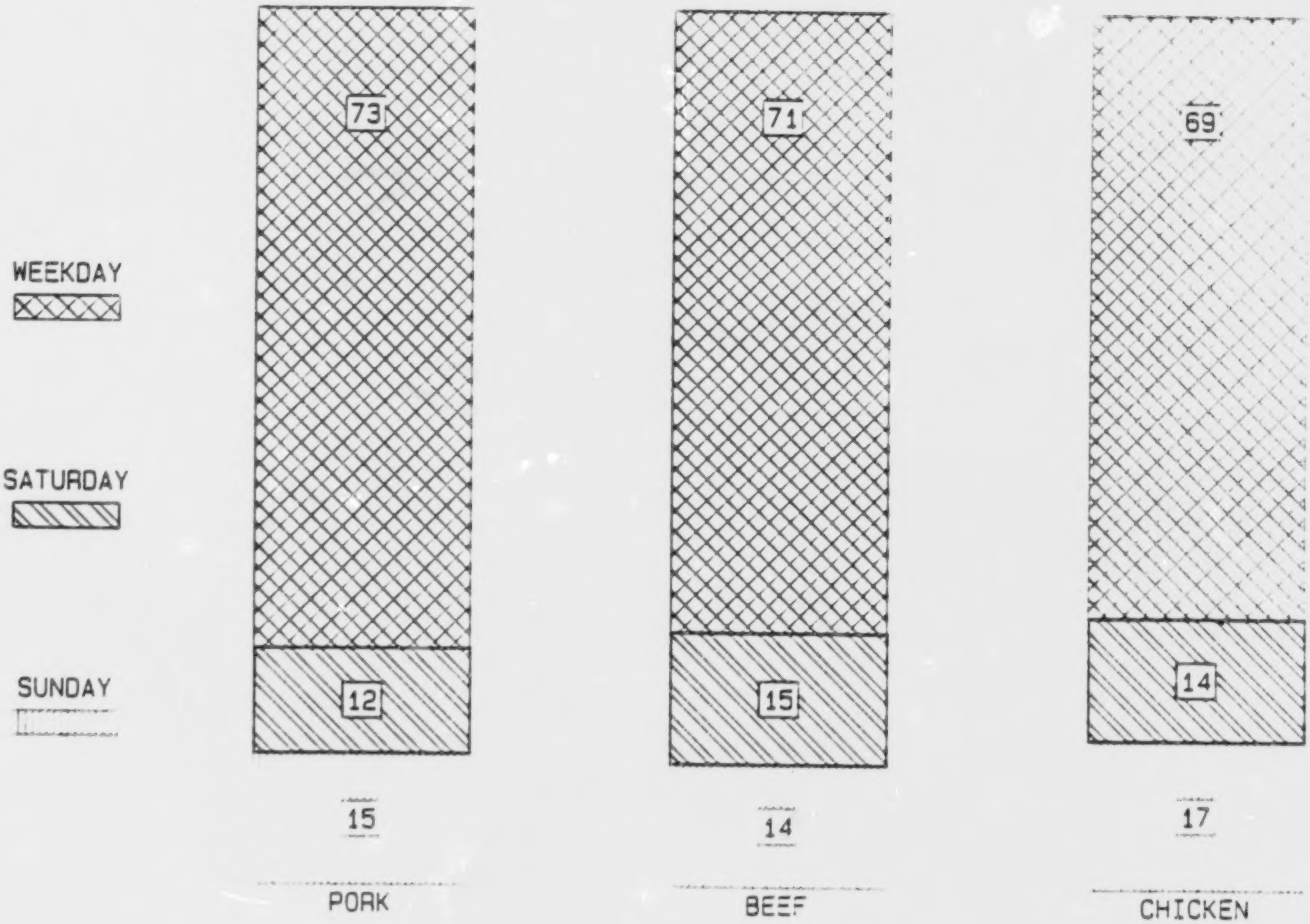
PORK AND HAM ARE MORE SEASONAL IN THEIR USE THAN BEEF AND CHICKEN

% CHANGE



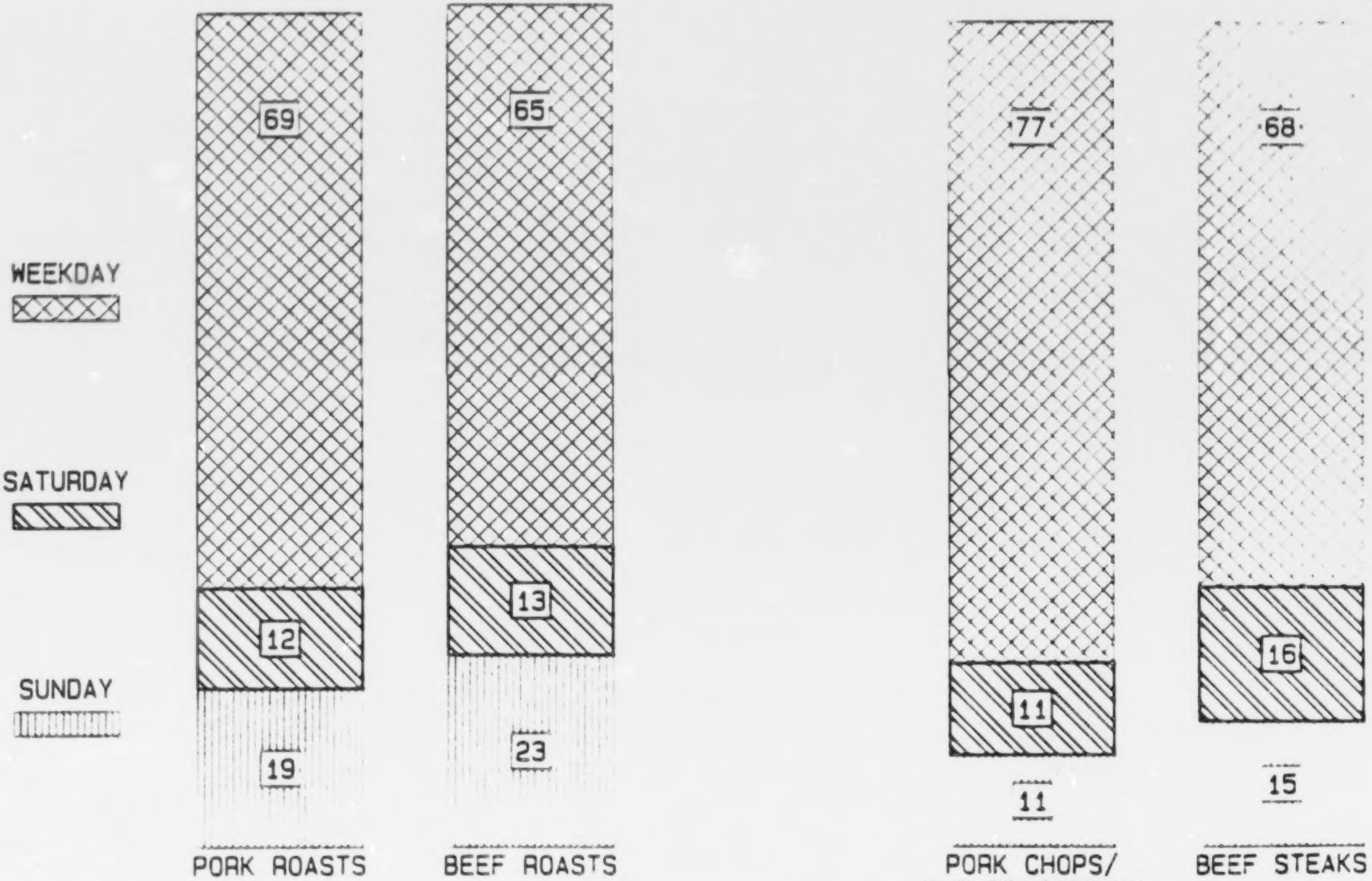
SHARE OF FRESH MEAT

% OF SERVINGS



SERVING OF FRESH PORK CUTS cf. FRESH BEEF CUTS

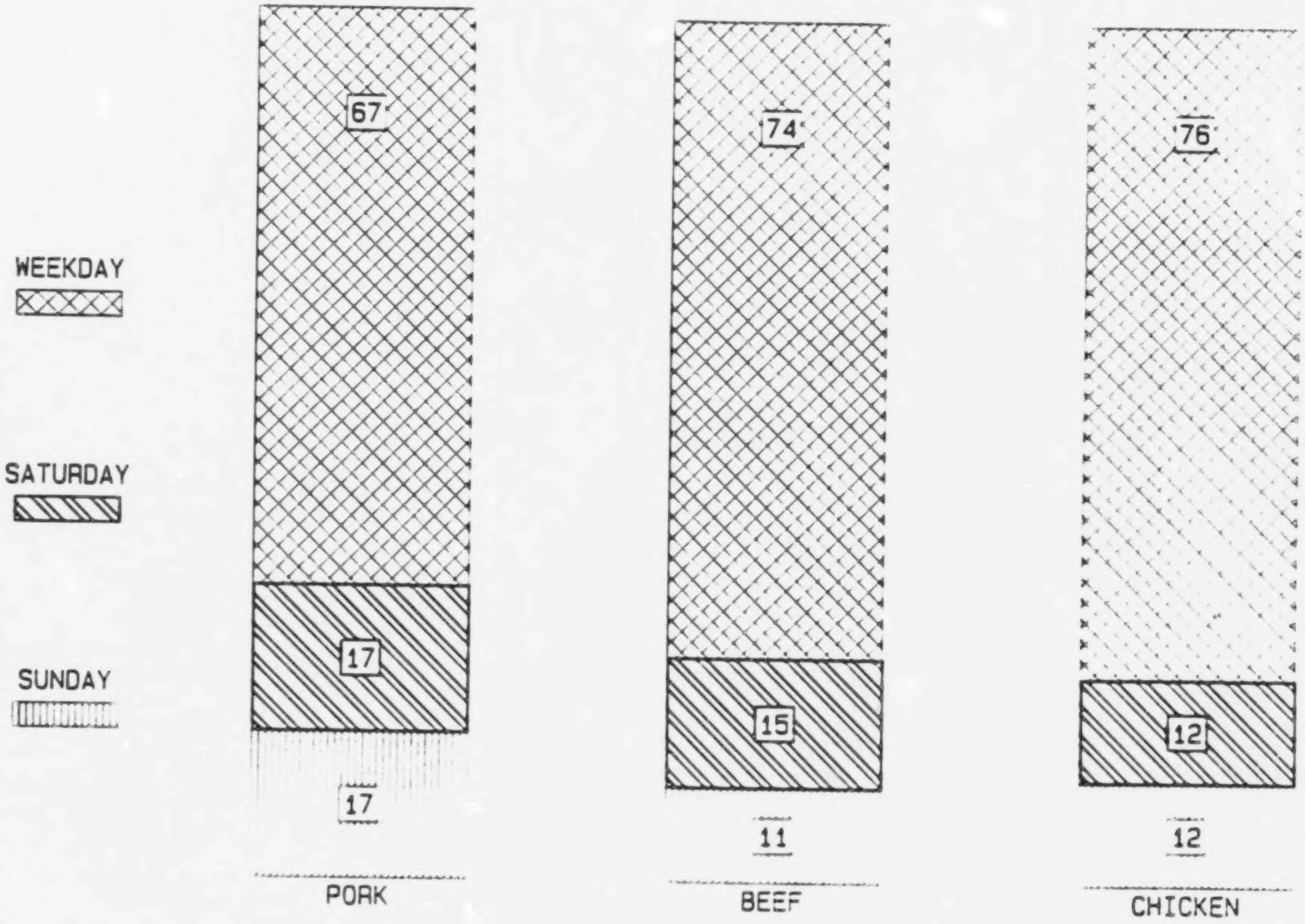
% OF SERVINGS



T25

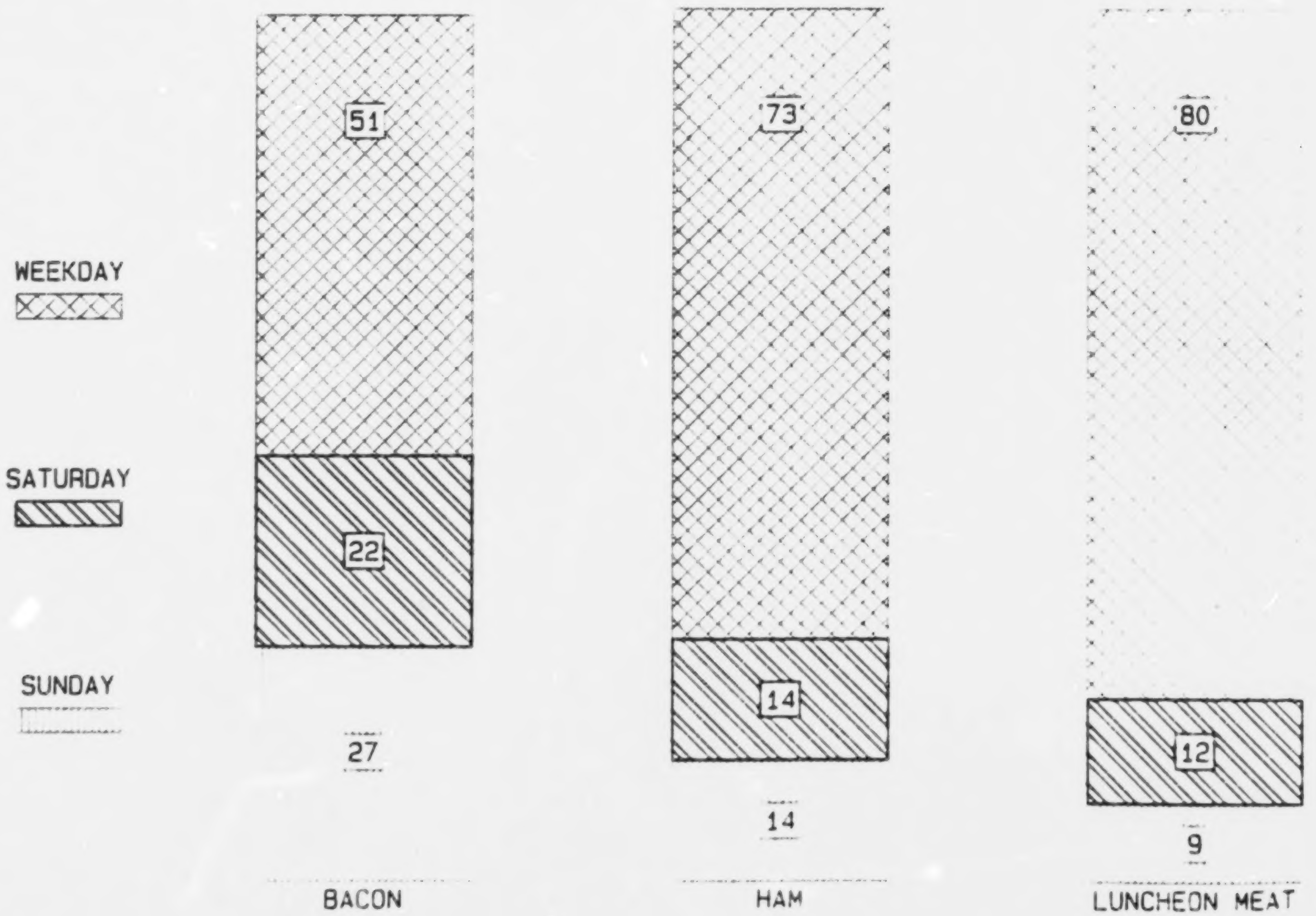
SERVING OF PROCESSED MEAT

% OF SERVINGS

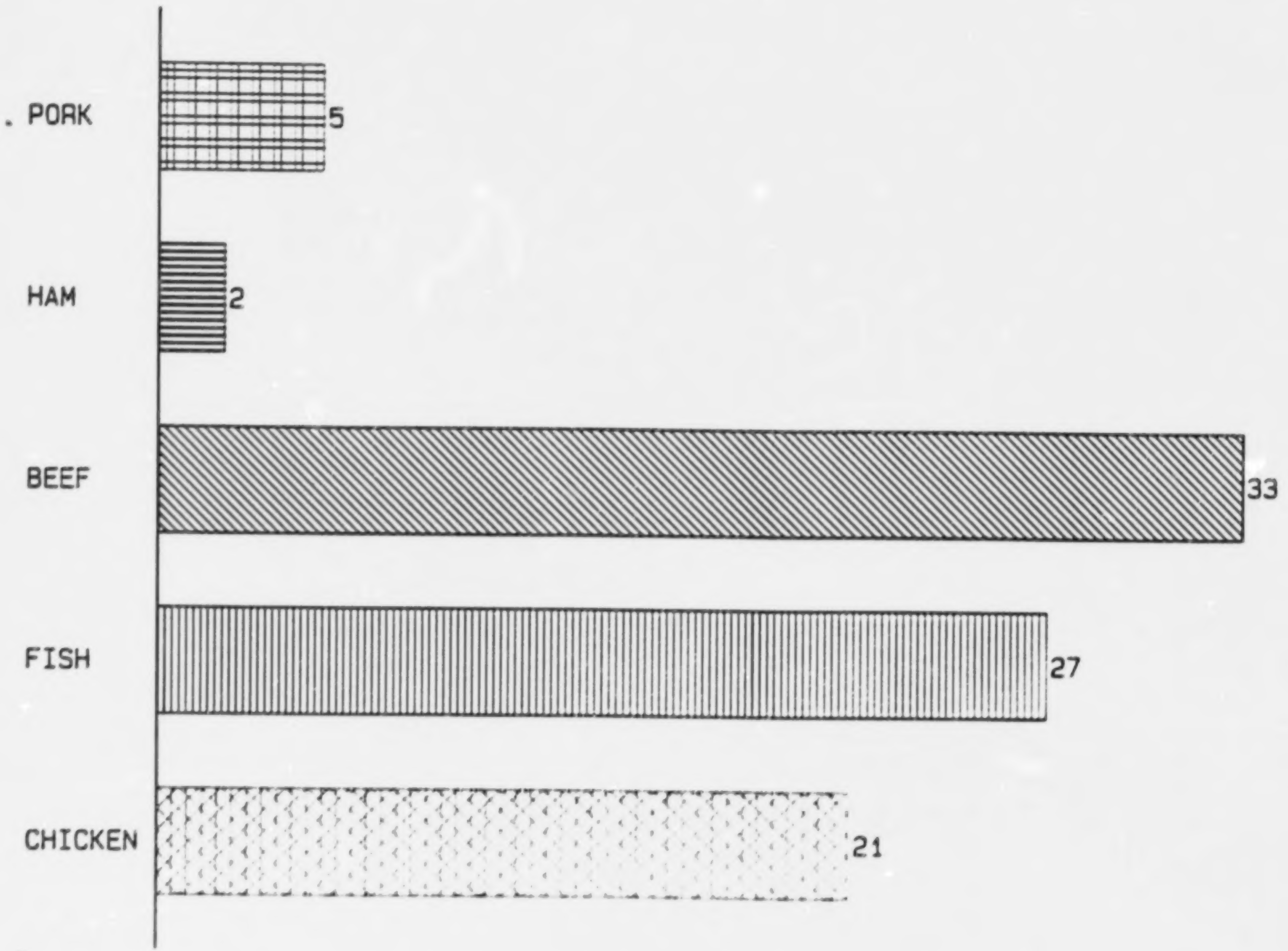


SERVING OF PROCESSED PORK

% OF SERVINGS

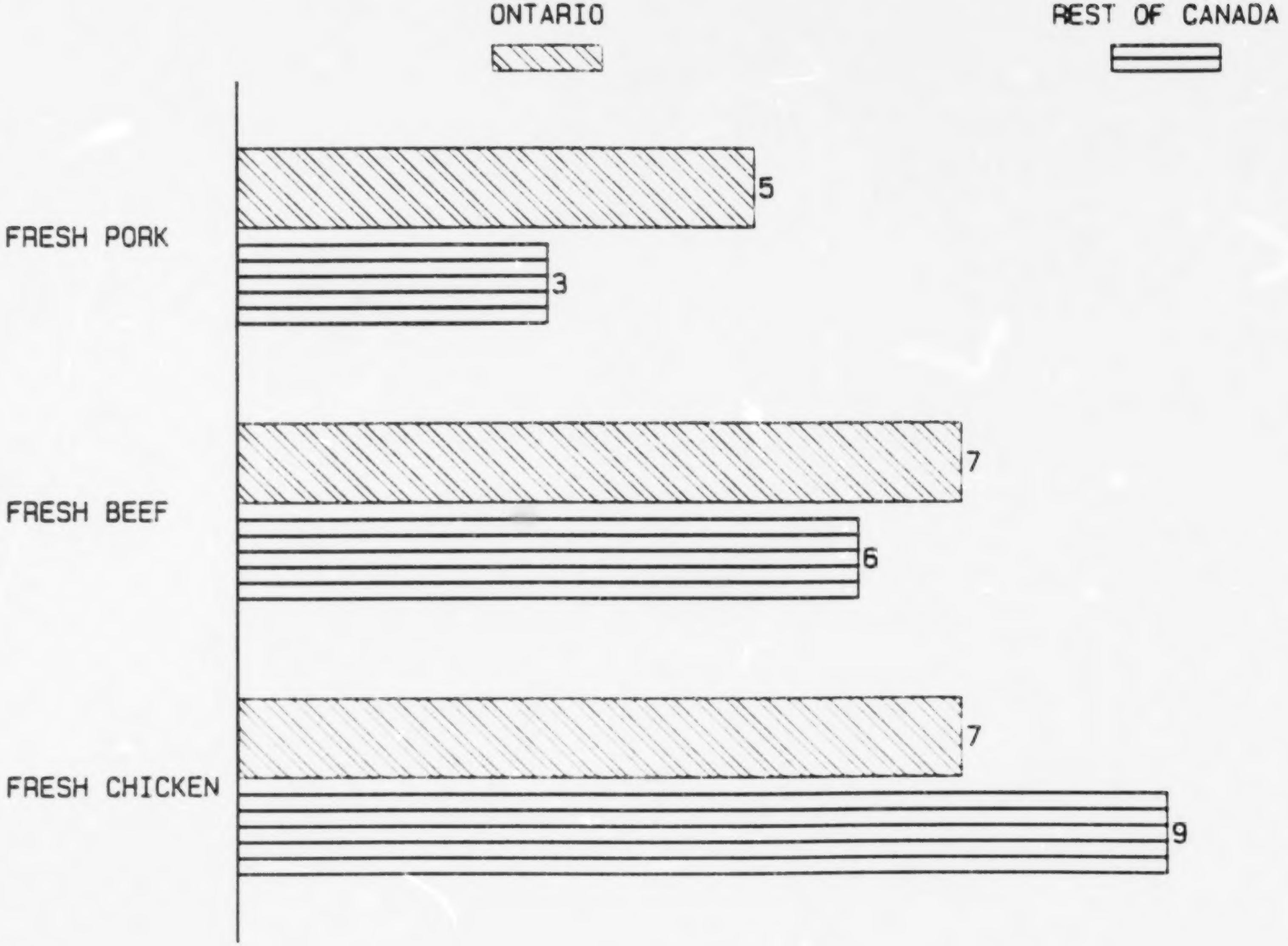


MEAT ONTARIANS FEEL THEY EAT MORE OUT OF HOME THAN IN HOME



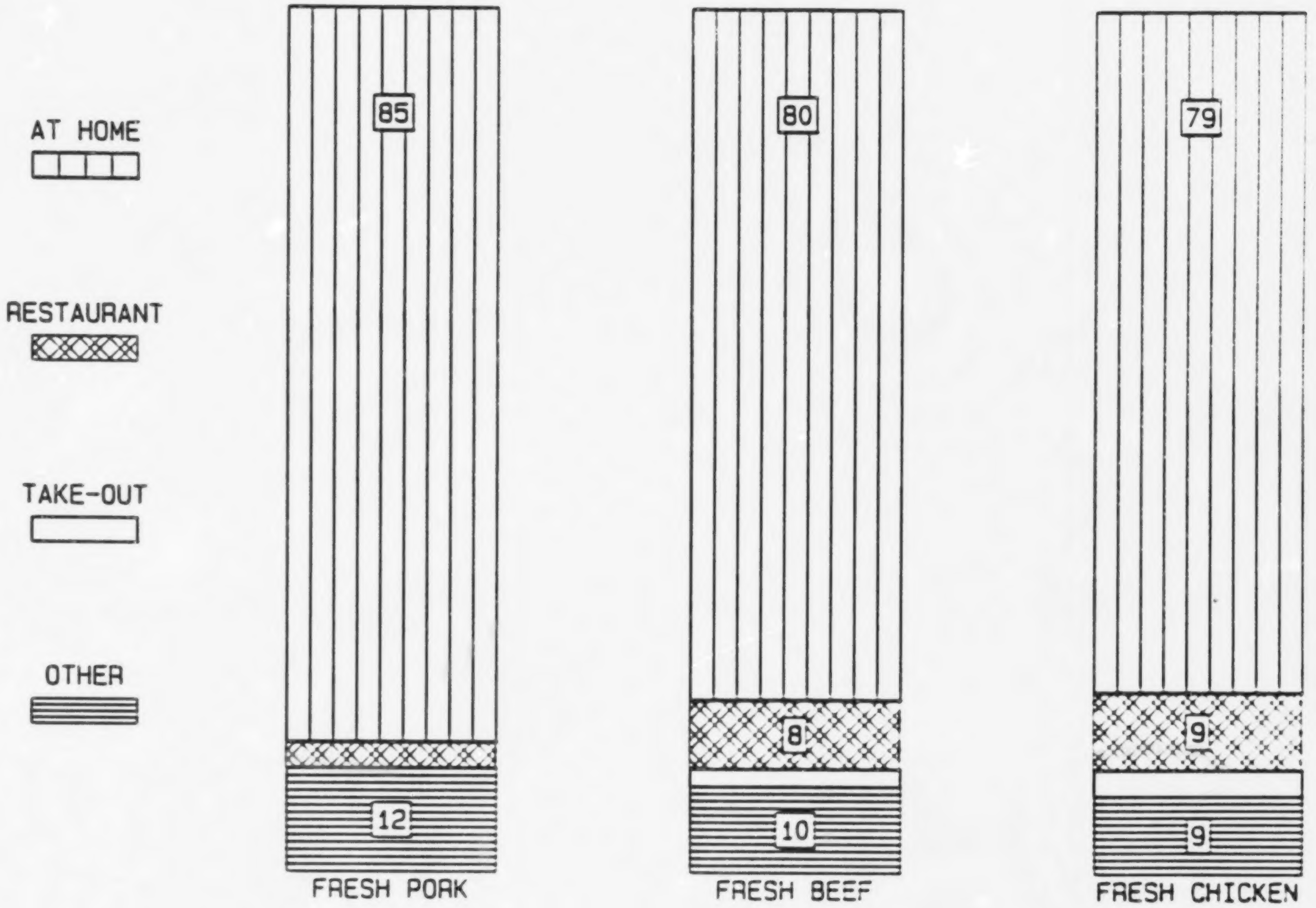
SPECIAL OCCASION SERVING OF FRESH MEATS

% OF SERVINGS



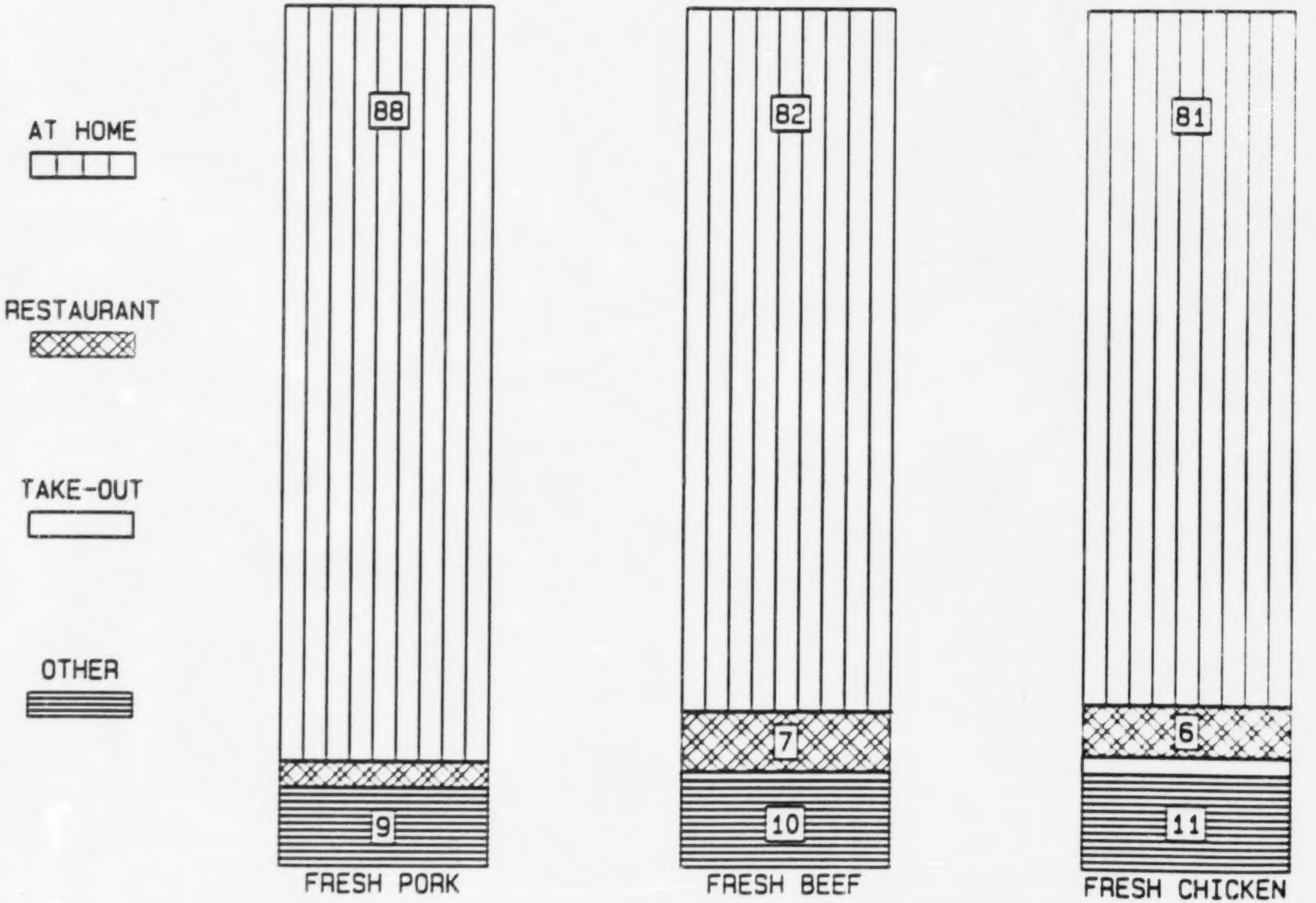
WHERE FRESH MEAT IS EATEN IN ONTARIO

% OF SERVINGS



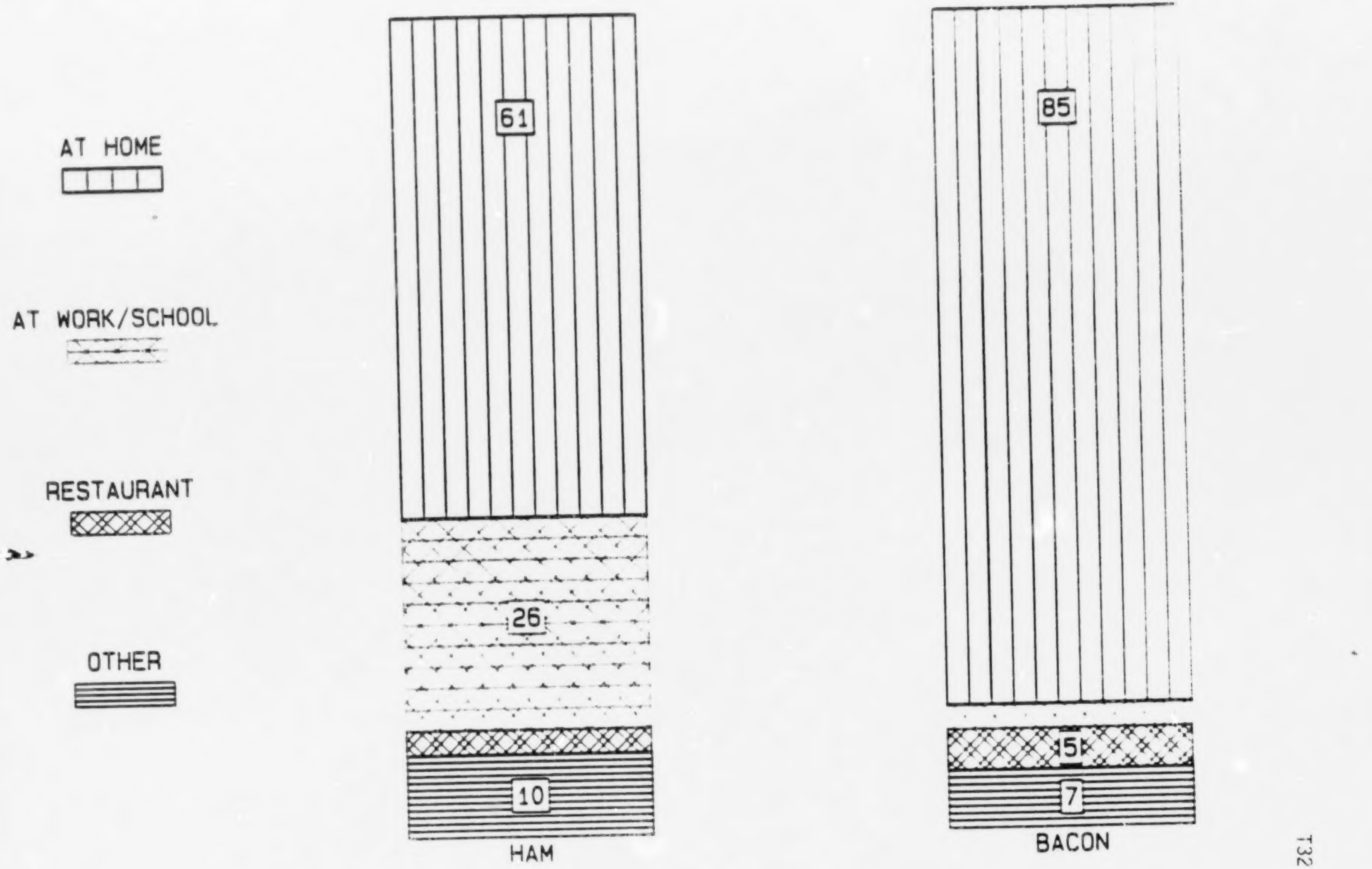
WHERE FRESH MEAT IS EATEN IN THE REST OF CANADA

% OF SERVINGS



WHERE HAM AND BACON ARE EATEN IN ONTARIO

% OF SERVINGS



T32

Table Reference

6. ATTITUDES TO FRESH PORK

- OVERALL, AMONGST ALL CANADIANS AND THOSE LIVING IN ONTARIO, IT IS CLEAR THAT FRESH PORK DOES NOT ENJOY THE SAME HIGH REGARD ACCORDED TO CHICKEN, BEEF AND FISH. HAM WAS VIEWED VERY SIMILARLY TO PORK. T33,T34

- COMPARED TO BEEF, CHICKEN AND FISH, PORK AND HAM WERE DESCRIBED AS:

  - LESS HEALTHY/NUTRITIOUS
  - LESS VERSATILE/CONVENIENT
  - LESS TASTY
  - LESS MOIST/TENDER

  IT WAS IN THE FIRST TWO AREAS THAT PORK WAS MOST CLEARLY DIFFERENTIATED FROM THE OTHER MEAT TYPES THOUGH IN TERMS OF VERSATILITY/CONVENIENCE FISH ALSO WAS NOT RATED PARTICULARLY HIGHLY. T35,T36

- GENERALLY, ONTARIANS AND THOSE LIVING IN THE REST OF CANADA VIEWED PORK AND HAM IN A SIMILAR LIGHT. HOWEVER, A FEW DIFFERENCES WERE APPARENT AND FOR FRESH PORK THESE HELP

Table Reference

TO EXPLAIN THE GREATER USAGE OF THIS MEAT BY ONTARIANS. THUS, COMPARED TO THOSE LIVING IN THE REST OF CANADA, ONTARIANS SAW FRESH PORK AS:

- EASIER TO DIGEST
- LESS CHEWY
- LESS FATTY
- LOWER IN CHOLESTEROL
- LESS HEAVY
- LESS EXPENSIVE T37

- HAM WAS PERCEIVED BY ONTARIANS AS:

  - LESS CHEWY
  - LESS FATTY
  - LESS HEAVY

    BUT

  - NOT KEEPING AS WELL

  ONTARIANS WERE, OF COURSE, RELATIVELY LIGHTER USERS OF HAM AND THE 'KEEPING' ISSUE MAY BE A KEY POINT IN EXPLAINING THIS DIFFERENCE IN BEHAVIOUR. T38

- OVERALL, THE IMPORTANCE ATTACHED TO FAVOURABLE PERCEPTIONS OF A MEAT FOR

Table Reference

HEALTH/NUTRITION AND VERSATILITY/CONVENIENCE CANNOT BE OVERSTRESSED. INDEED, STATISTICAL ANALYSIS OF THE MEAT PERCEPTION DATA HIGHLIGHTS THREE KEY DIMENSIONS FOR MEAT BUYING:

- HEALTH/NUTRITION (AS REPRESENTED BY "LOWER CALORIES", "HEALTHY", "NUTRITIOUS")
- VERSATILITY/CONVENIENCE (AS REPRESENTED BY "KEEPS WELL", "VERSATILE")
- PRICE

ONLY FOR PRICE, WHERE PORK IS SEEN AS CHEAPER THAN BEEF AND FISH BUT MORE EXPENSIVE THAN CHICKEN, IS PORK CURRENTLY COMPETITIVE. T39

- AN EXAMINATION OF THE DESCRIPTIONS APPLIED TO FRESH PORK BY HEAVY AND LIGHT USERS RESPECTIVELY SHOWS, NOT SURPRISINGLY, THAT HEAVY USERS VIEWED THE MEAT MORE FAVOURABLY. BUT NOT TO THE EXTENT THAT MIGHT HAVE BEEN EXPECTED. THE BIGGEST ADVANTAGES SEEN BY HEAVY USERS WERE IN TERMS OF HEALTH, EASE OF DIGESTION, TASTE AND MOISTNESS. T40,T41

Table Reference

- PERHAPS RATHER SURPRISINGLY, HEAVY USERS OF PORK COULD IDENTIFY NO ATTRIBUTES FOR WHICH THEY FELT PORK WAS SUPERIOR TO THE OTHER MEAT TYPES. HEAVY PORK USERS FELT PORK WAS INFERIOR TO BEEF, CHICKEN AND FISH FOR ALL HEALTH/NUTRITION FACTORS. IN ADDITION, THEY FOUND PORK ONLY SUPERIOR TO FISH FOR THE VERSATILITY/CONVENIENCE FACTORS. ON A POSITIVE NOTE, THEY DID FEEL PORK WAS AS TASTY AS BEEF. T42

- LOOKING AT HOMEMAKERS' ATTITUDES TOWARDS PORK, BEEF AND CHICKEN (AS OPPOSED TO HOW THEY DESCRIBED THE DIFFERENT MEATS), AGAIN SHOWS PORK IN A DISADVANTAGED LIGHT. PORK SCORED RELATIVELY POORLY FOR VERSATILITY MEASURES SUCH AS:

  - GOOD FOR LEFT-OVERS
  - GOOD FOR FREEZING
  - SERVING VERSATILITY
  - EASY TO 'DRESS UP'
  - GOOD MENU STAPLE T43

- ALSO, PORK SCORED LESS WELL FOR HEALTH CONCERNS:

Table Reference

- NEED TO COOK WELL-DONE
- NOT A GOOD IDEA TO EAT WHEN HOT

T44

- AND AGAIN, PORK SCORED LESS WELL FOR GENERAL APPEAL:
  - MEAT EVERYONE/FAMILY LIKES
  - GOOD CHOICE FOR GUESTS
  - MEAT PEOPLE SEEM TO BE EATING MORE THAN THEY USED TO

T45

- IT MUST BE BORNE IN MIND THAT BOTH IN TERMS OF THE WAY HOMEMAKERS DESCRIBED FRESH PORK AND THEIR ATTITUDES TOWARDS IT, HOMEMAKERS WERE NOT SHOWING THEMSELVES TO BE OVERWHELMINGLY NEGATIVE. THEY LIKE FRESH PORK AND SERVE A LOT OF IT. BUT THERE ARE NO CLEAR AREAS FOR WHICH PORK DEMONSTRATES A SUPERIORITY TO BEEF AND CHICKEN.

- ONTARIANS AND RESIDENTS IN THE REST OF CANADA, AND HEAVY AND LIGHT PORK USERS, ALL HELD VERY MUCH THE SAME ATTITUDES TOWARDS PORK. THE ONLY REAL DIFFERENCE DEMONSTRATED WAS IN TERMS OF OVERALL APPEAL WHERE, NOT SURPRISINGLY, HEAVY PORK USERS WERE MORE ENTHUSIASTIC THAN LIGHT PORK USERS.

T46

T47,T49

Table Reference

- As was true for homemakers' descriptions of pork, heavy pork users did not show any attitudinal measures for which they felt pork had an advantage over beef and chicken. Indeed, even heavy pork users, the group with the most favourable attitudes towards pork, felt you had to be careful to cook pork well-done. T50

- An analysis of the cooking and shopping habits and attitudes of homemakers shows that homemakers can be considered as five distinct groups:
  - Modern Homemakers (20% of all homemakers)
  - "Middle Canadians": Diet Concerned (24%)
  - "Middle Canadians": Price Concerned (26%)
  - Traditional Homemakers (15%)
  - Low Involved Homemakers (15%). T51,T52

Summaries describing each of these groupings are shown on Tables 54 - 58. However, it is clear that it is Modern and "Middle Canadian" Homemakers whose views and behaviour must be

Table Reference

ADDRESSED IF CHANGES IN MEAT USAGE PATTERNS ARE TO BE EFFECTED. THESE CANADIANS ARE INTERESTED IN DIETARY AND MENU ISSUES, AND THUS CONCERNED ABOUT WHAT THEY AND THEIR FAMILIES EAT. MODERN HOMEMAKERS, WHO ARE OPINION LEADERS IN THE COMMUNITY, FORM A PARTICULARLY INTERESTING GROUP TO STUDY.

- IT HAS BEEN SHOWN ALREADY THAT, IN GENERAL, ALL CANADIAN HOMEMAKERS HAVE VERY SIMILAR VIEWS OF THE DIFFERENT MEAT TYPES. THIS WAS CLEARLY DEMONSTRATED WHEN THE MEAT DESCRIPTIONS ARE ANALYSED BY THE FIVE GROUPS OF HOMEMAKERS (OUTLINED ABOVE). ALTHOUGH SMALL DIFFERENCES OCCUR, BY FAR THE DOMINANT FINDING IS THAT THEY ALL SEE PORK, AND THE OTHER MEATS, IN VERY MUCH THE SAME WAY. T59,T63

- CONSIDERING A NUMBER OF MARKETING ISSUES FOR PORK, IT IS CLEAR THAT:

  - GROCERY SHOPPERS GENERALLY LOOK FOR SPECIALS, AND DO CHECK MEAT SPECIALS T64

  - THERE IS A FAIR AMOUNT OF IMPROMPTU MEAT BUYING BASED ON "SOMETHING

LOOKING GOOD" ON THE MEAT COUNTER

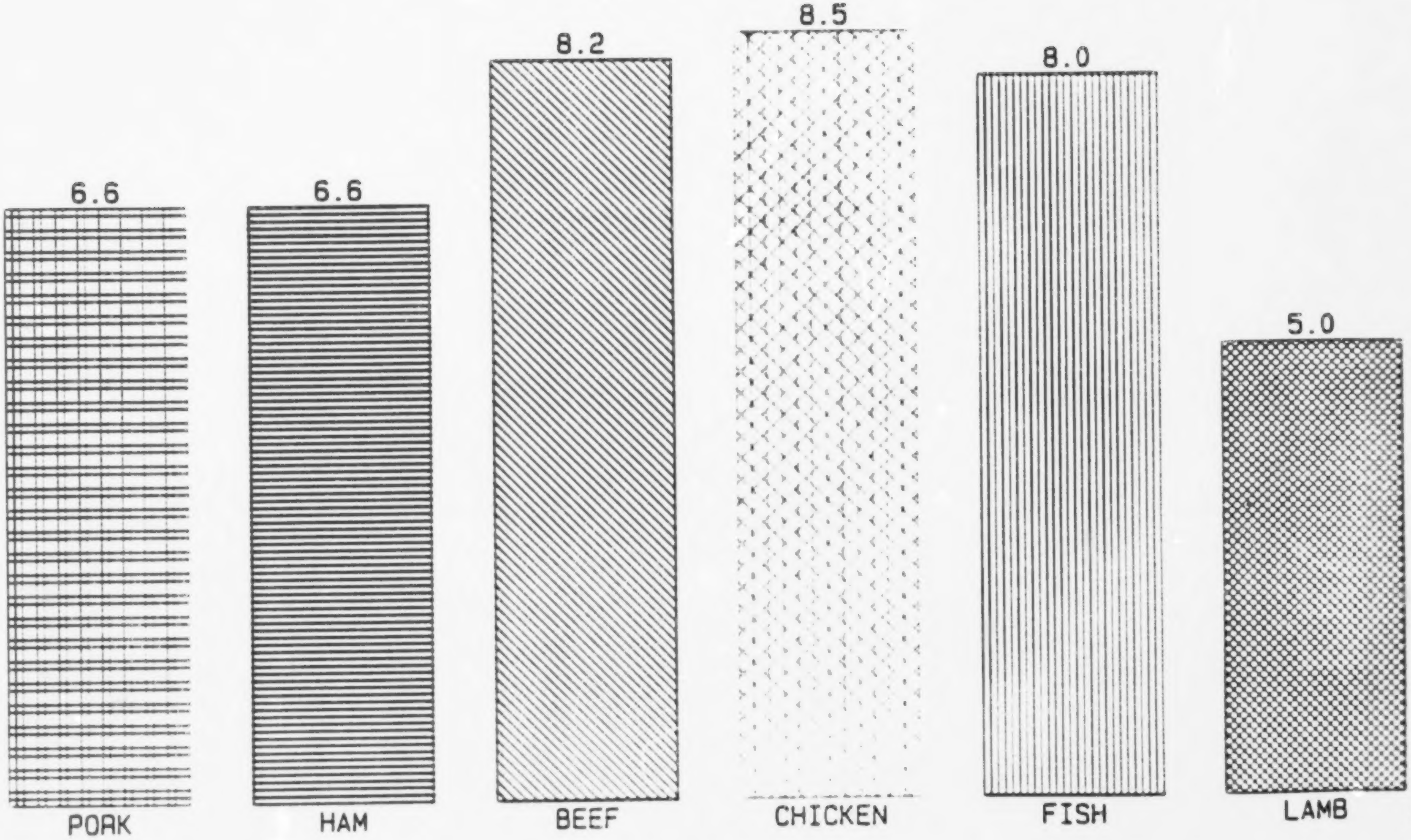
Table Reference

- LACK OF RECIPES IS NOT A HINDERANCE TO THE MORE FREQUENT USE OF PORK, THOUGH GENERALLY RECIPES ARE ALWAYS APPRECIATED T66

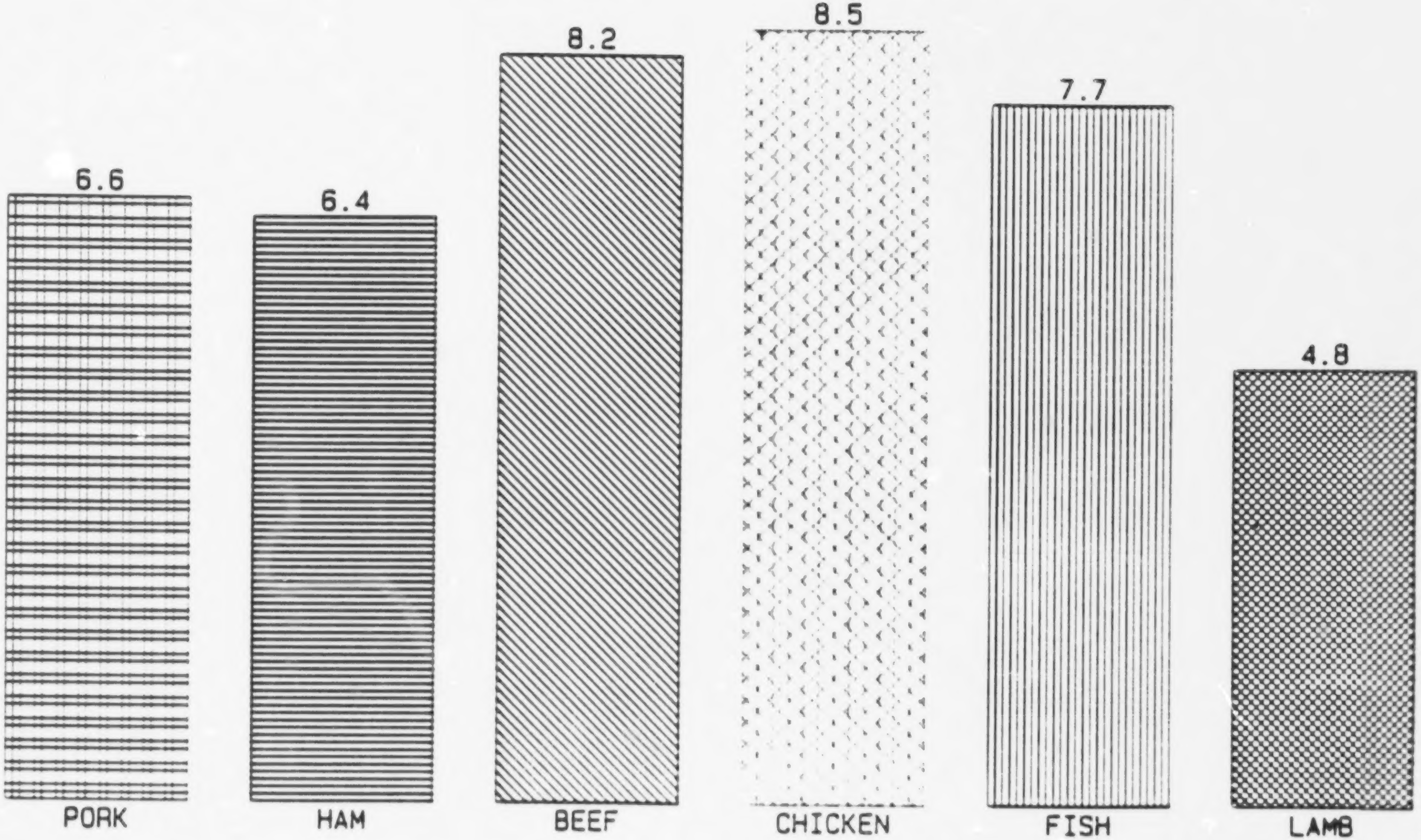
- LEFTOVERS ARE CONSIDERED TO BE A VERY USEFUL CONTRIBUTION TO THE HOUSEHOLD'S MENU. T67

OVERALL MEAT RATING

ALL CANADIANS

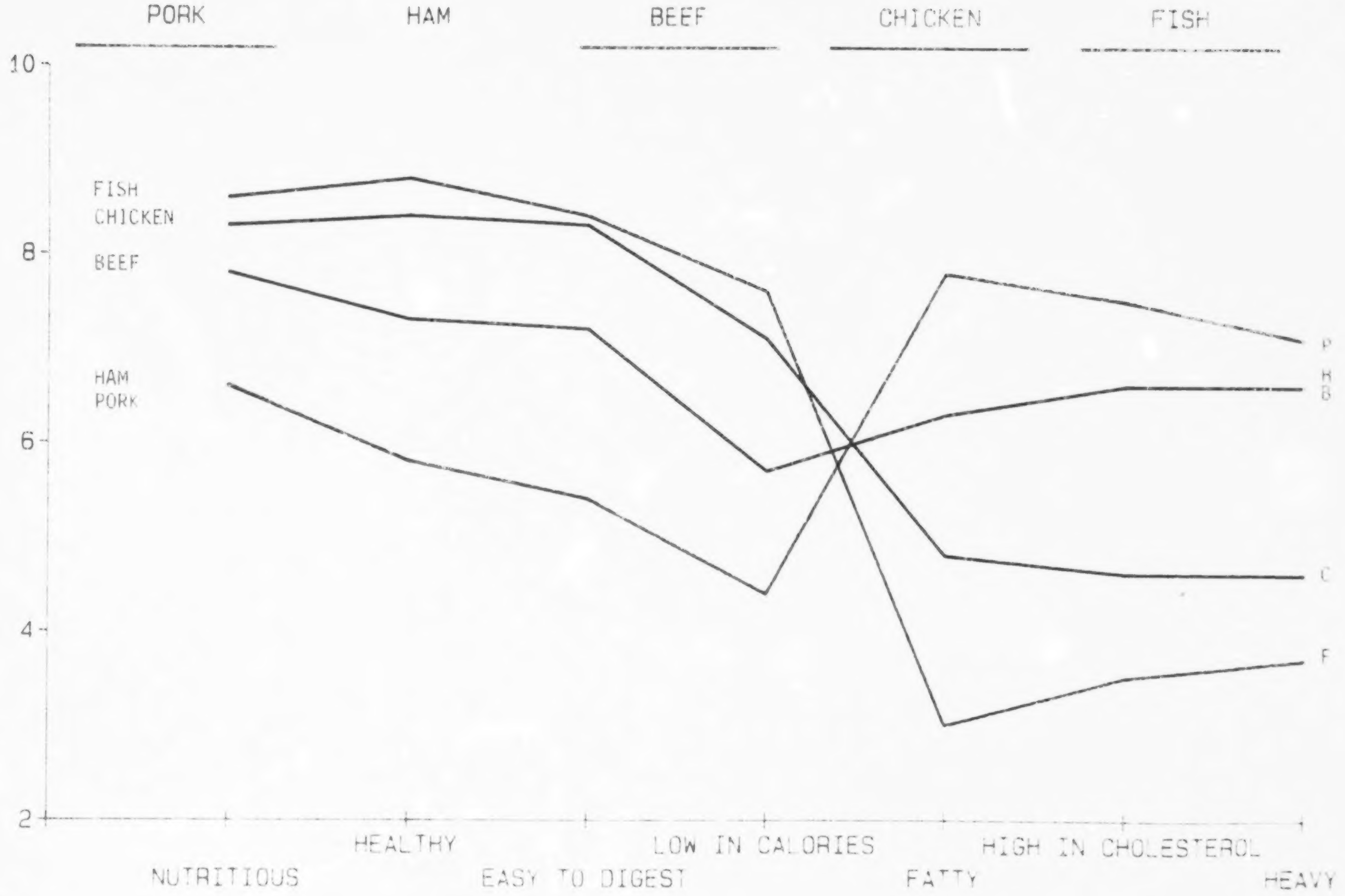


OVERALL MEAT RATING
ONTARIO

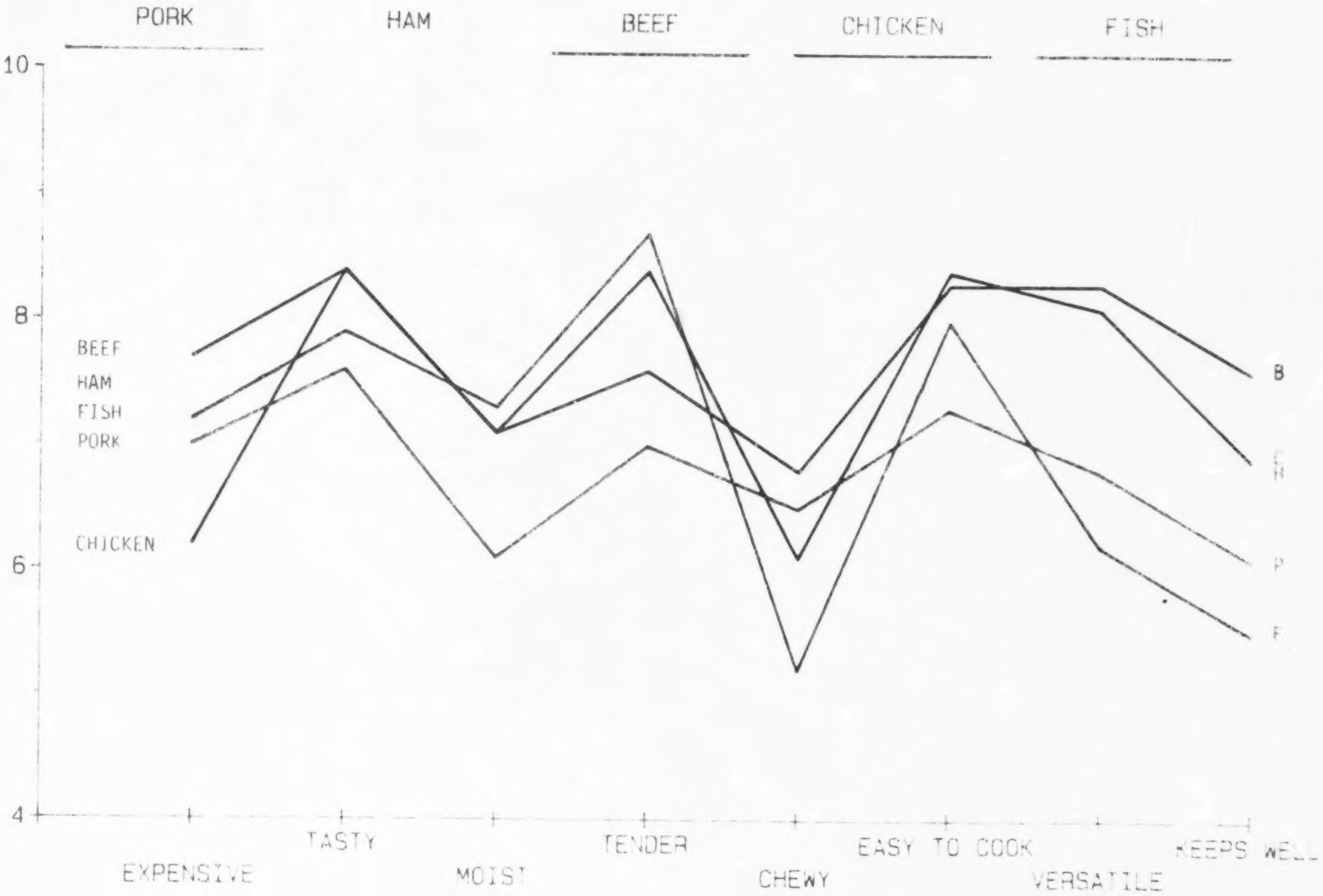


T34

MEAT DESCRIPTIONS



MEAT DESCRIPTIONS



PORK DESCRIPTIONS: ONTARIO cf. REST OF CANADA

	ONTARIO (400)	REST OF CANADA (601)
TASTY	7.5	7.7
TENDER	7.1	7.0
MOIST	6.3	6.0
CHEWY	6.1	$\boxed{6.7}$
EASY TO COOK	7.6	7.2
VERSATILE	6.7	6.8
KEEPS WELL	6.1	6.2
NUTRITIOUS	6.6	6.6
HEALTHY	6.0	5.8
EASY TO DIGEST	$\boxed{5.8}$	5.2
LOW IN CALORIES	4.4	4.4
FATTY	7.4	$\boxed{8.1}$
HIGH IN CHOLESTEROL	7.1	$\boxed{7.7}$
HEAVY	6.6	$\boxed{7.4}$
EXPENSIVE	6.7	$\boxed{7.2}$

NOTE: SCORING SYSTEM IS FROM DEFINITELY = +10 TO
DEFINITELY NOT = 0

☐ = RELATIVELY HIGH

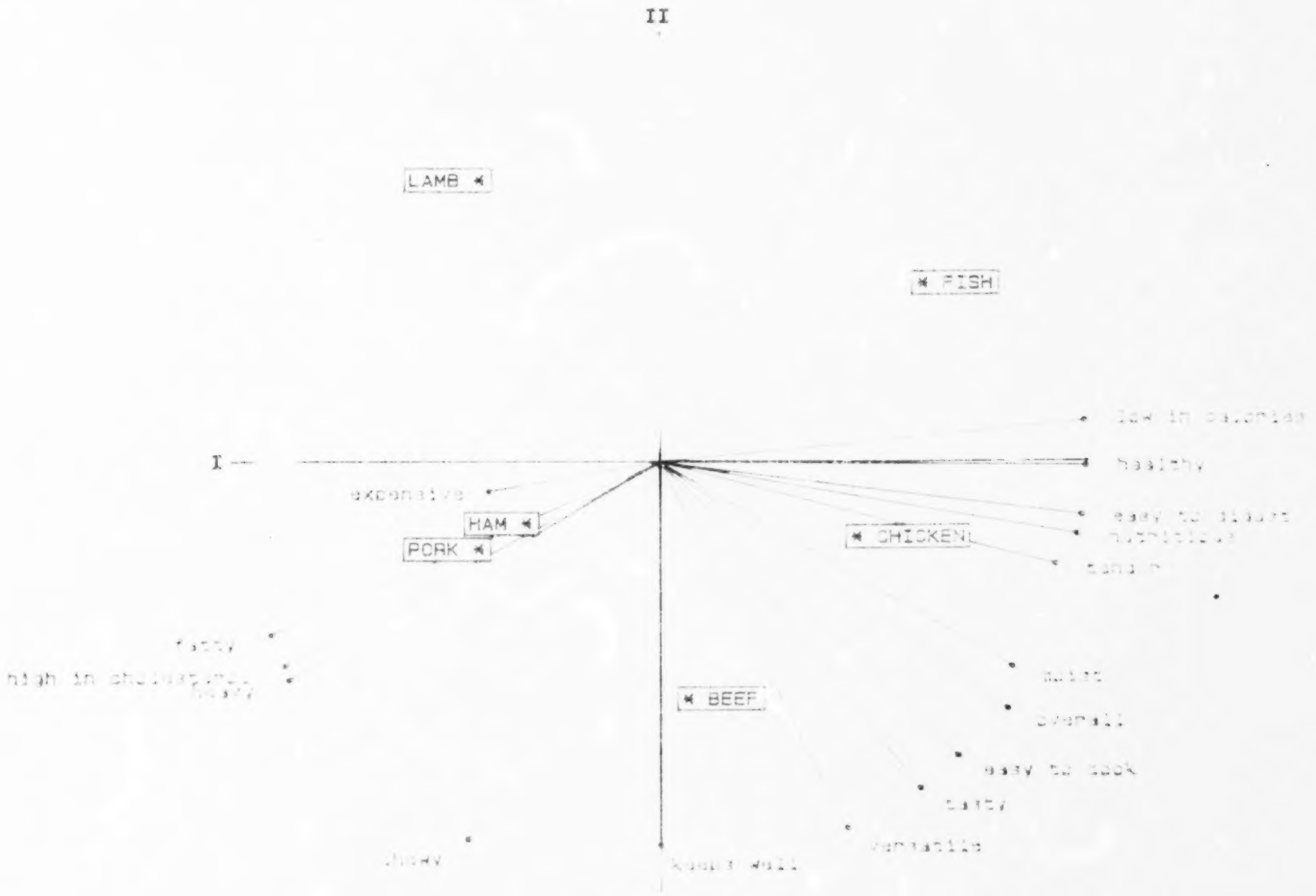
HAM: ONTARIO CF. REST OF CANADA

	ONTARIO (400)	REST OF CANADA (601)
TASTY	7.5	7.8
TENDER	7.4	7.4
MOIST	6.7	6.5
CHEWY	5.9	$\boxed{6.7}$
EASY TO COOK	7.7	7.6
VERSATILE	6.2	6.2
KEEPS WELL	6.5	$\boxed{7.1}$
NUTRITIOUS	6.4	6.6
HEALTHY	5.9	5.9
EASY TO DIGEST	6.2	6.0
LOW IN CALORIES	4.6	4.6
FATTY	6.5	$\boxed{7.3}$
HIGH IN CHOLESTEROL	7.0	7.3
HEAVY	6.2	$\boxed{7.0}$
EXPENSIVE	7.3	7.5

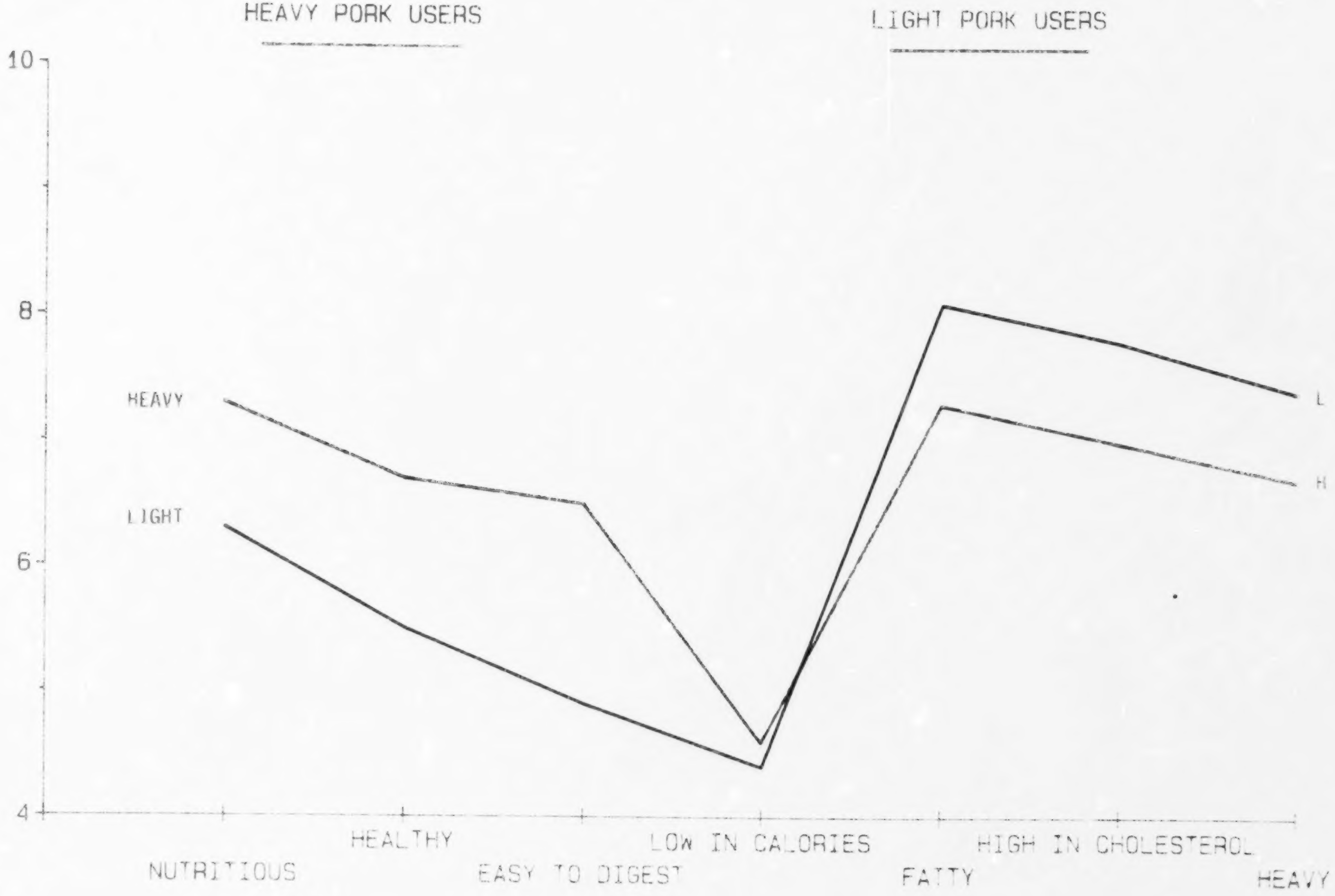
NOTE: SCORING SYSTEM IS FROM DEFINITELY = +10 TO DEFINITELY NOT = 0

☐ = RELATIVELY HIGH

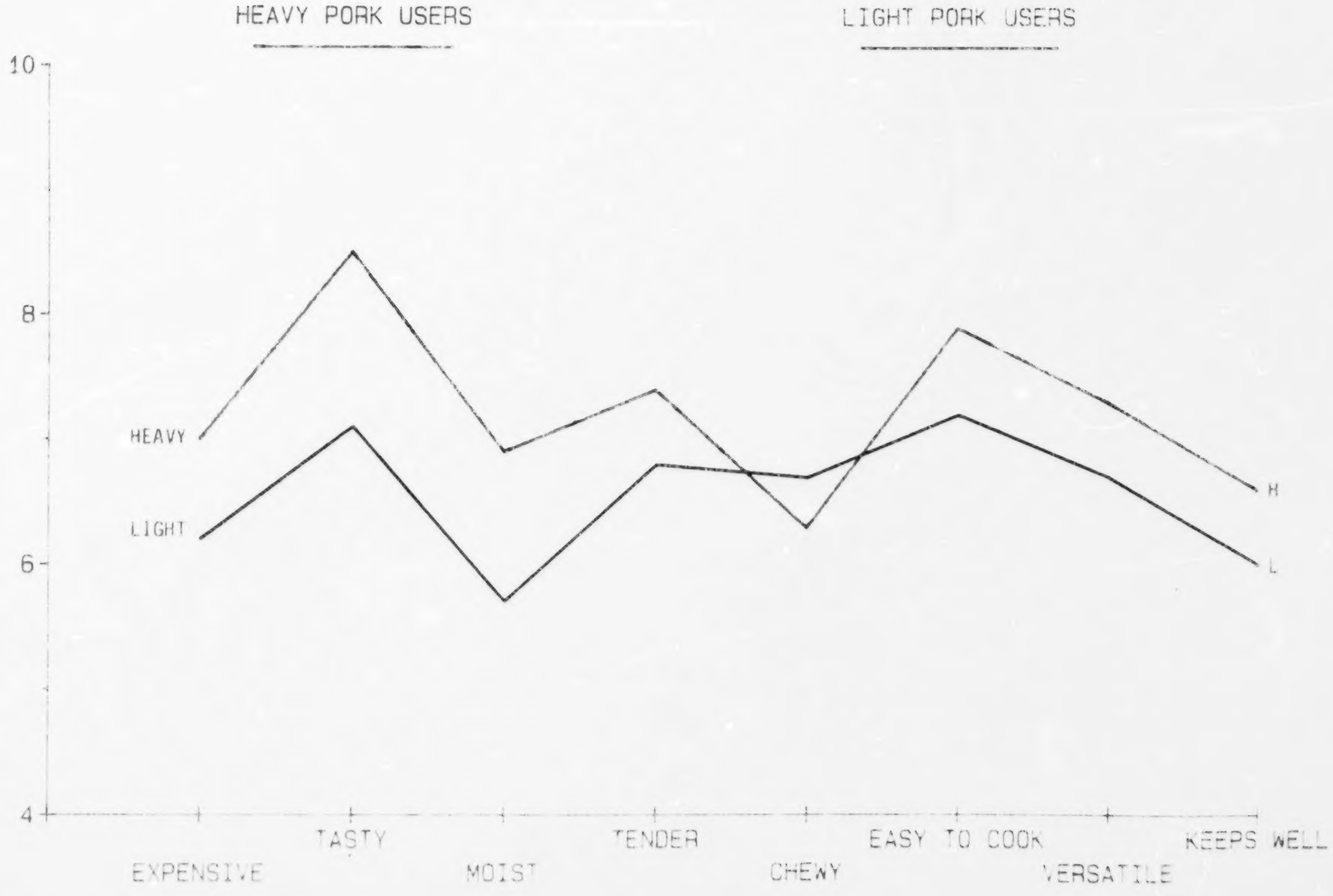
MEAT PERCEPTUAL MAP



PORK DESCRIPTIONS



PORK DESCRIPTIONS



T42

DESCRIPTIONS FROM HEAVY PORK USERS

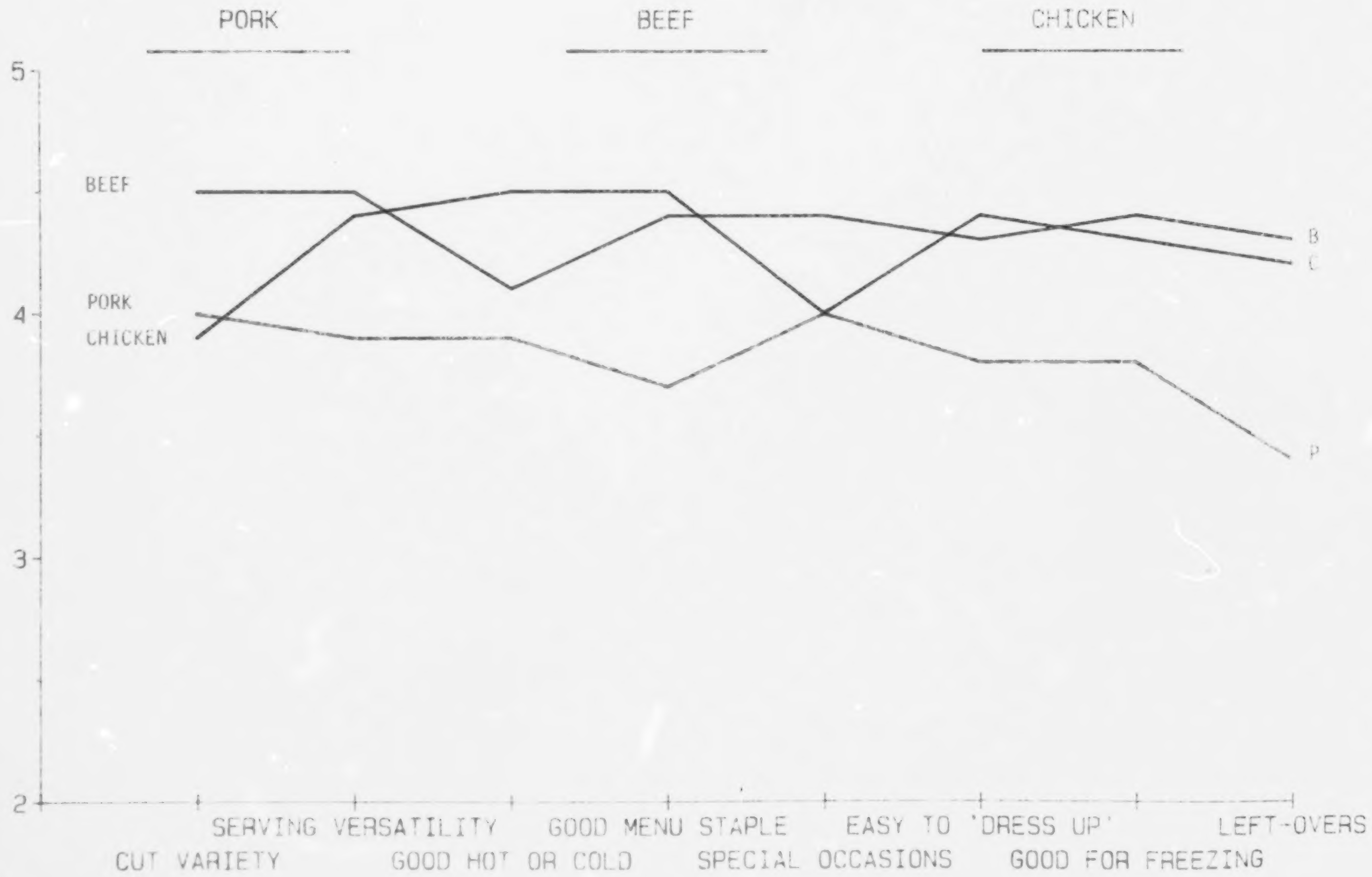
	PORK	BEEF	CHICKEN	FISH
TASTY	8.5	8.5	8.1	7.7
TENDER	7.4	7.6	8.1	8.3
MOIST	6.9	7.1	7.2	7.1
CHEWY	6.3	6.4	5.7	4.8
EASY TO COOK	7.9	8.2	8.1	7.7
VERSATILE	7.3	8.2	8.0	5.9
KEEPS WELL	6.6	7.6	6.8	5.4
NUTRITIOUS	7.3	7.9	8.1	8.4
HEALTHY	6.7	7.3	8.2	8.5
EASY TO DIGEST	6.5	7.4	8.2	8.2
LOW IN CALORIES	4.6	5.6	7.0	7.5
FATTY	7.3	6.1	5.2	2.9
HIGH IN CHOLESTEROL	7.0	6.2	4.9	3.6
HEAVY	6.7	6.4	4.8	3.8
EXPENSIVE	7.0	7.7	5.9	6.8

NOTE: I) SCORING SYSTEM IS FROM DEFINITELY = +10 TO DEFINITELY NOT = 0
II) HEAVY PORK USER = 20%+ OF MEAT PURCHASES
LIGHT PORK USER = 5% - 10% OF MEAT PURCHASES

MEAN SCORES THAT ARE NOTICEABLY HIGHER OR LOWER ARE BOXED FOR EMPHASIS.

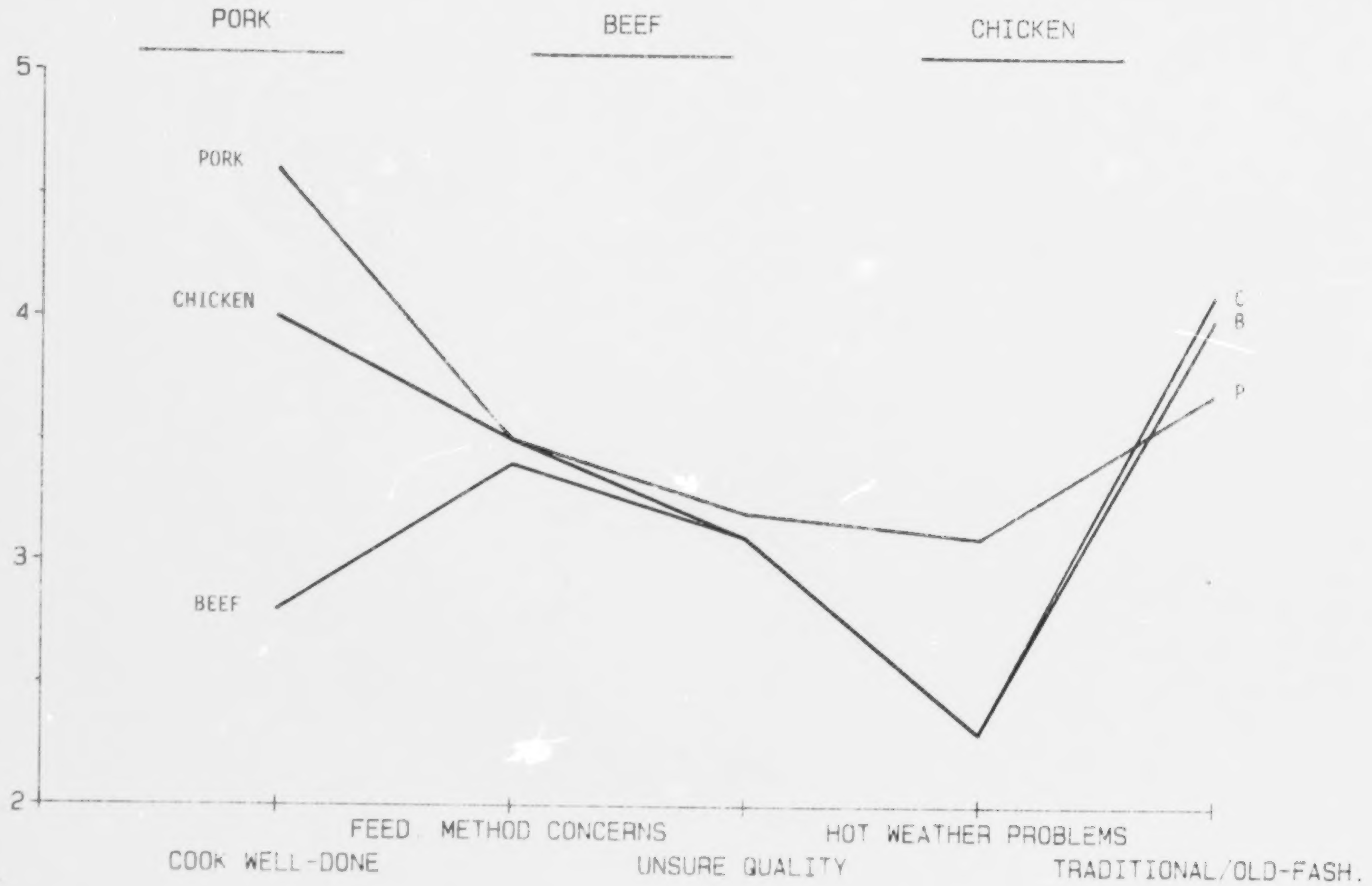
ATTITUDES TOWARDS MEAT

VERSATILITY



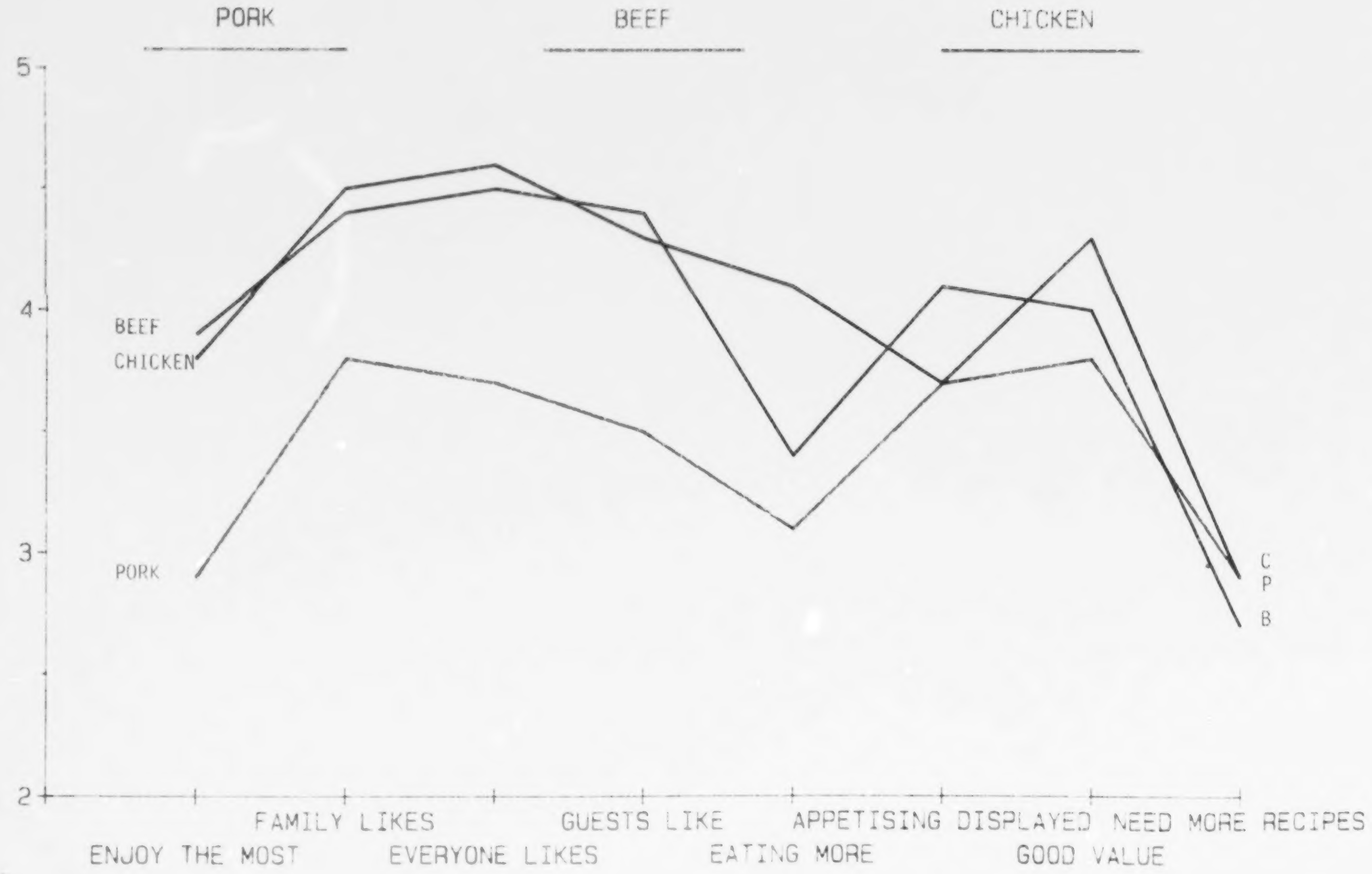
ATTITUDES TOWARDS MEAT

HEALTH CONCERNS



ATTITUDES TOWARDS MEAT

APPEAL



PORK ATTITUDES: ONTARIO CF. REST OF CANADA

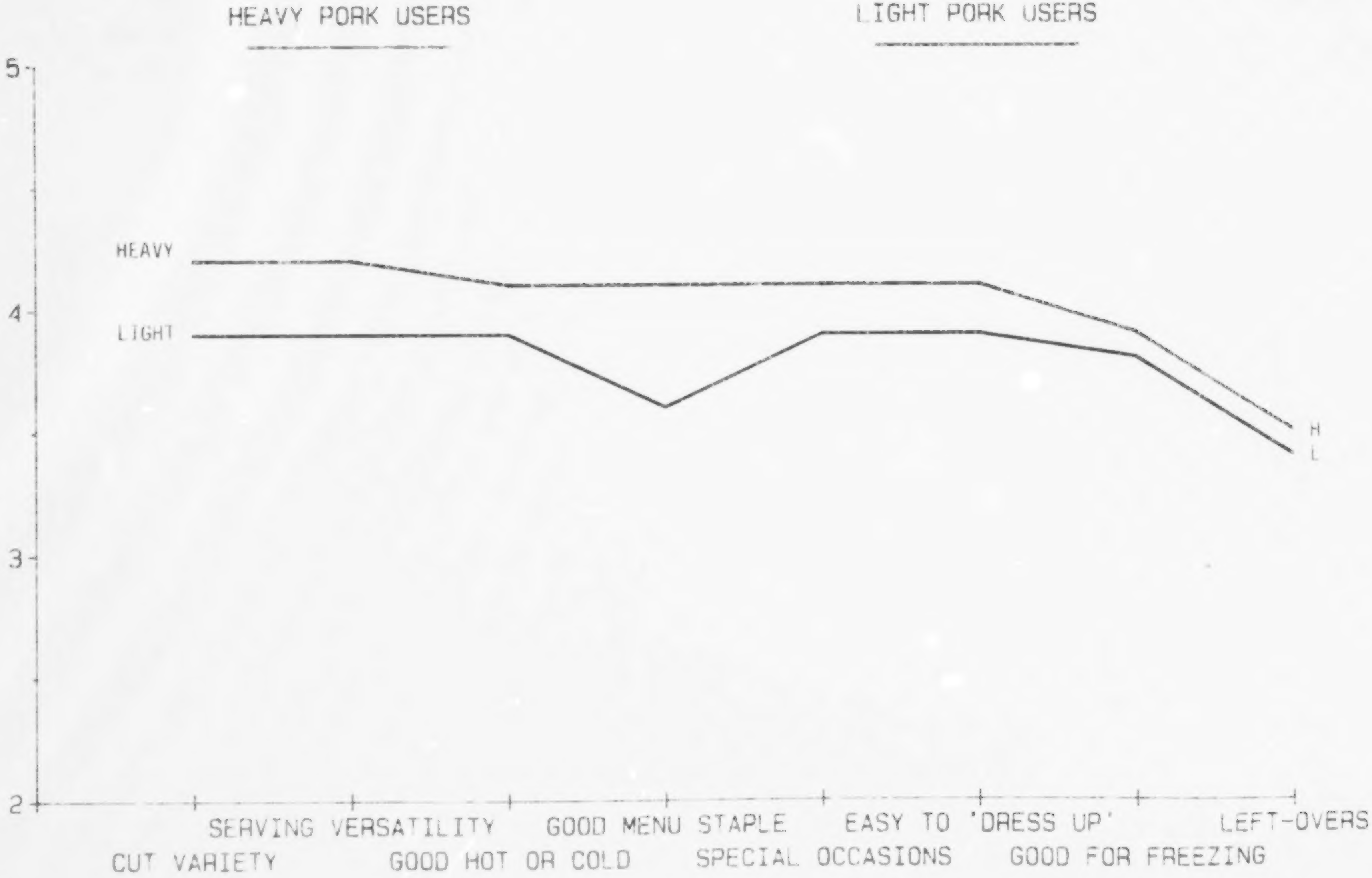
	ONTARIO (400)	REST OF CANADA (601)
VERSATILITY		
GOOD CUTS FOR SPECIAL OCCASIONS	3.9	4.0
GREAT VARIETY OF CUTS	3.9	4.0
MANY DIFFERENT WAYS IT CAN BE SERVED	3.8	4.0
IT'S GOOD HOT OR COLD	3.8	3.9
ESPECIALLY GOOD FOR FREEZING	3.8	3.8
EASY TO 'DRESS UP' OR MAKE INTERESTING	3.7	3.9
VERY GOOD MENU STAPLE	3.7	3.8
LOTS OF WAYS OF USING ITS LEFT-OVERS	3.2	3.5
HEALTH CONCERNS		
YOU HAVE TO BE CAREFUL TO COOK IT WELL-DONE	4.5	4.6
RATHER TRADITIONAL, ALMOST OLD-FASHIONED MEAT	3.6	3.8
CONCERNED ABOUT THE EFFECT THAT MODERN FEEDING METHODS HAVE ON THIS MEAT	3.4	3.6
YOU CAN NEVER BE SURE OF THE QUALITY YOU'RE GETTING	3.0	3.3
NOT A GOOD IDEA TO EAT IT WHEN IT'S HOT	2.7	$\boxed{3.3}$
APPEAL		
GOOD VALUE	3.8	3.8
LIKED BY ALL THE FAMILY	3.8	3.8
ALMOST EVERYONE LIKES IT	3.7	3.7
ALWAYS LOOKS APPETISING WHEN DISPLAYED IN MEAT COUNTERS	3.6	3.8
A GOOD CHOICE FOR GUESTS	3.5	3.5
PEOPLE SEEM TO BE EATING IT MORE THAN THEY USED TO	3.0	3.1
WOULD USE IT MORE IF I HAD MORE RECIPES FOR IT	2.7	3.0

NOTE: SCORING SYSTEM IS STRONGLY AGREE = +5 TO STRONGLY DISAGREE = +1

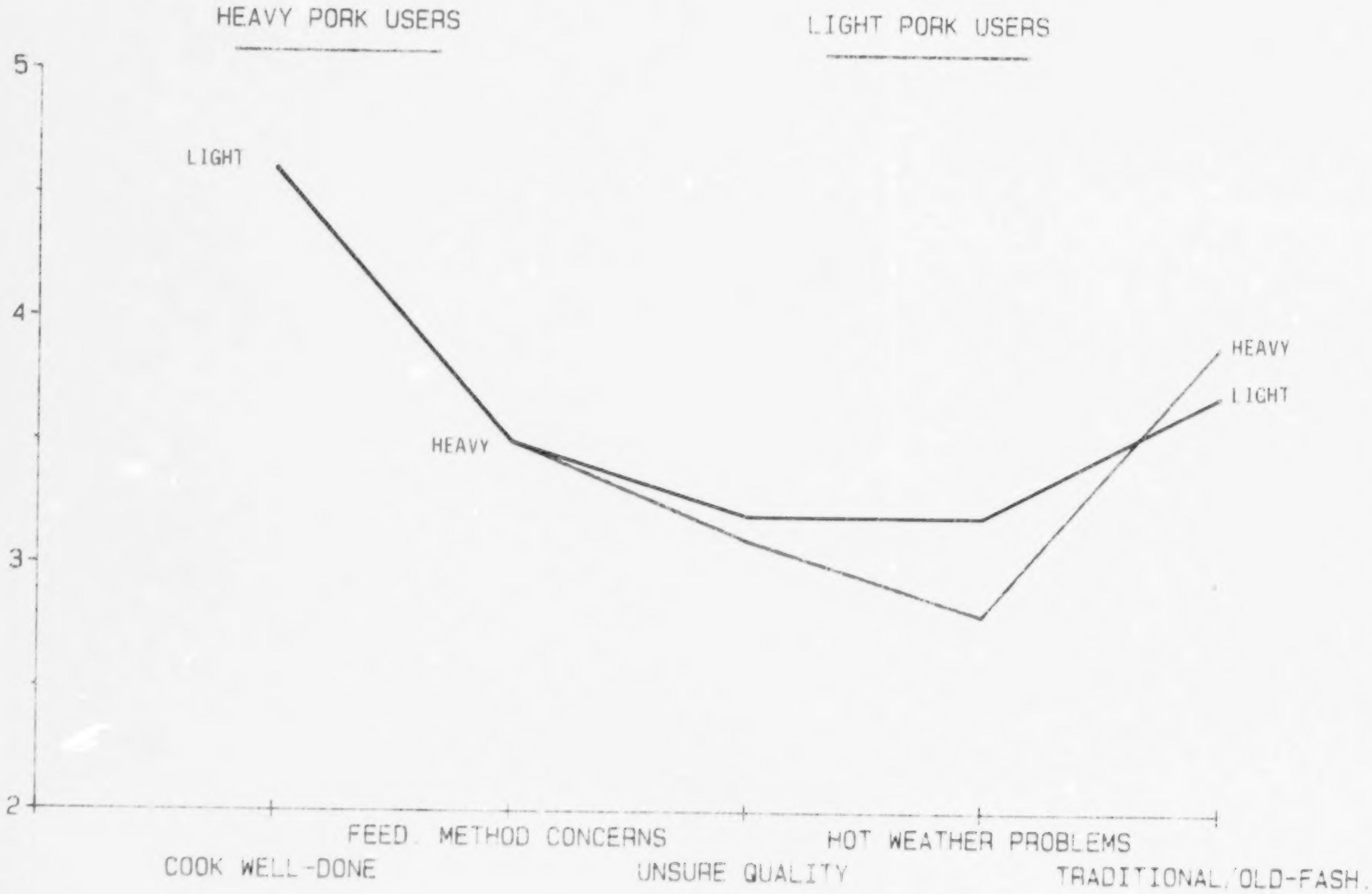
☐ = RELATIVELY HIGH

ATTITUDES TOWARDS PORK

VERSATILITY

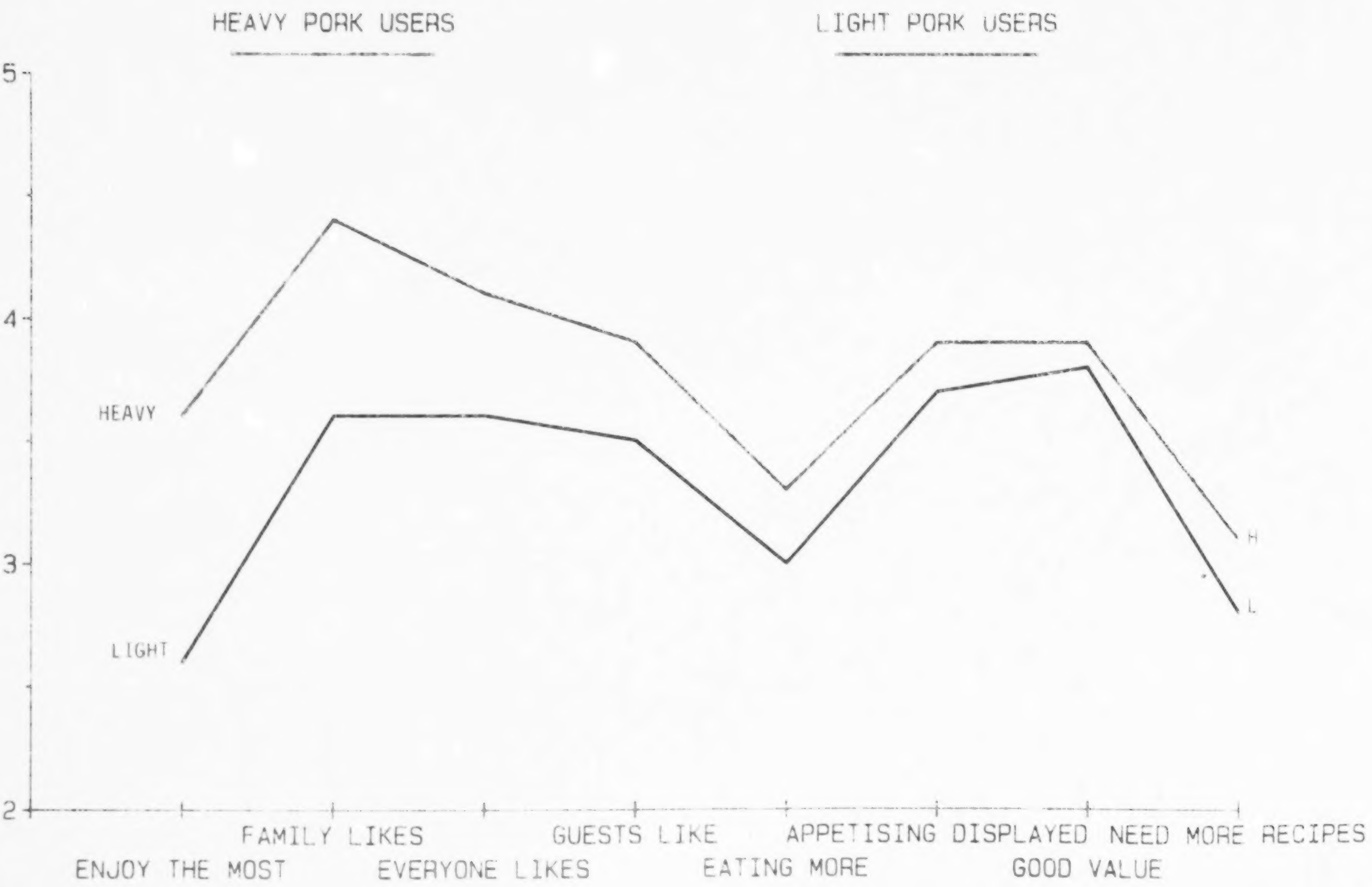


ATTITUDES TOWARDS PORK
HEALTH CONCERNS



ATTITUDES TOWARDS PORK

APPEAL



T50

ATTITUDES OF HEAVY PORK USERS

	PORK	BEEF	CHICKEN
VERSATILITY			
GREAT VARIETY OF CUTS	$\boxed{4.2}$	$\boxed{4.4}$	3.8
MANY DIFFERENT WAYS IT CAN BE SERVED	4.2	4.3	4.5
VERY GOOD MENU STAPLE	4.1	4.4	4.3
GOOD CUTS FOR SPECIAL OCCASIONS	4.1	4.4	3.9
EASY TO 'DRESS UP' OR MAKE INTERESTING	4.1	4.2	4.2
IT'S GOOD HOT OR COLD	4.1	4.1	4.2
ESPECIALLY GOOD FOR FREEZING	3.9	$\boxed{4.4}$	4.2
LOTS OF WAYS OF USING ITS LEFT-OVERS	3.5	$\boxed{4.2}$	$\boxed{4.1}$
HEALTH CONCERNS			
YOU HAVE TO BE CAREFUL TO COOK IT WELL-DONE	$\boxed{4.6}$	3.0	4.0
RATHER TRADITIONAL, ALMOST OLD-FASHIONED MEAT	3.9	4.0	4.1
CONCERNED ABOUT THE EFFECT THAT MODERN FEEDING METHODS HAVE ON THIS MEAT	3.5	3.5	3.4
YOU CAN NEVER BE SURE OF THE QUALITY YOU'RE GETTING	3.1	3.2	3.2
NOT A GOOD IDEA TO EAT IT WHEN IT'S HOT	$\boxed{2.8}$	2.4	2.4
APPEAL			
LIKED BY ALL THE FAMILY	4.4	4.4	4.5
ALMOST EVERYONE LIKES IT	4.1	$\boxed{4.7}$	$\boxed{4.6}$
A GOOD CHOICE FOR GUESTS	3.9	$\boxed{4.4}$	4.2
ALWAYS LOOKS APPETISING WHEN DISPLAYED IN MEAT COUNTERS	3.9	4.0	3.8
GOOD VALUE	3.9	3.8	4.1
PEOPLE SEEM TO BE EATING IT MORE THAN THEY USED TO	3.3	3.4	$\boxed{3.9}$
WOULD USE IT MORE IF I HAD MORE RECIPES FOR IT	3.1	2.7	2.8

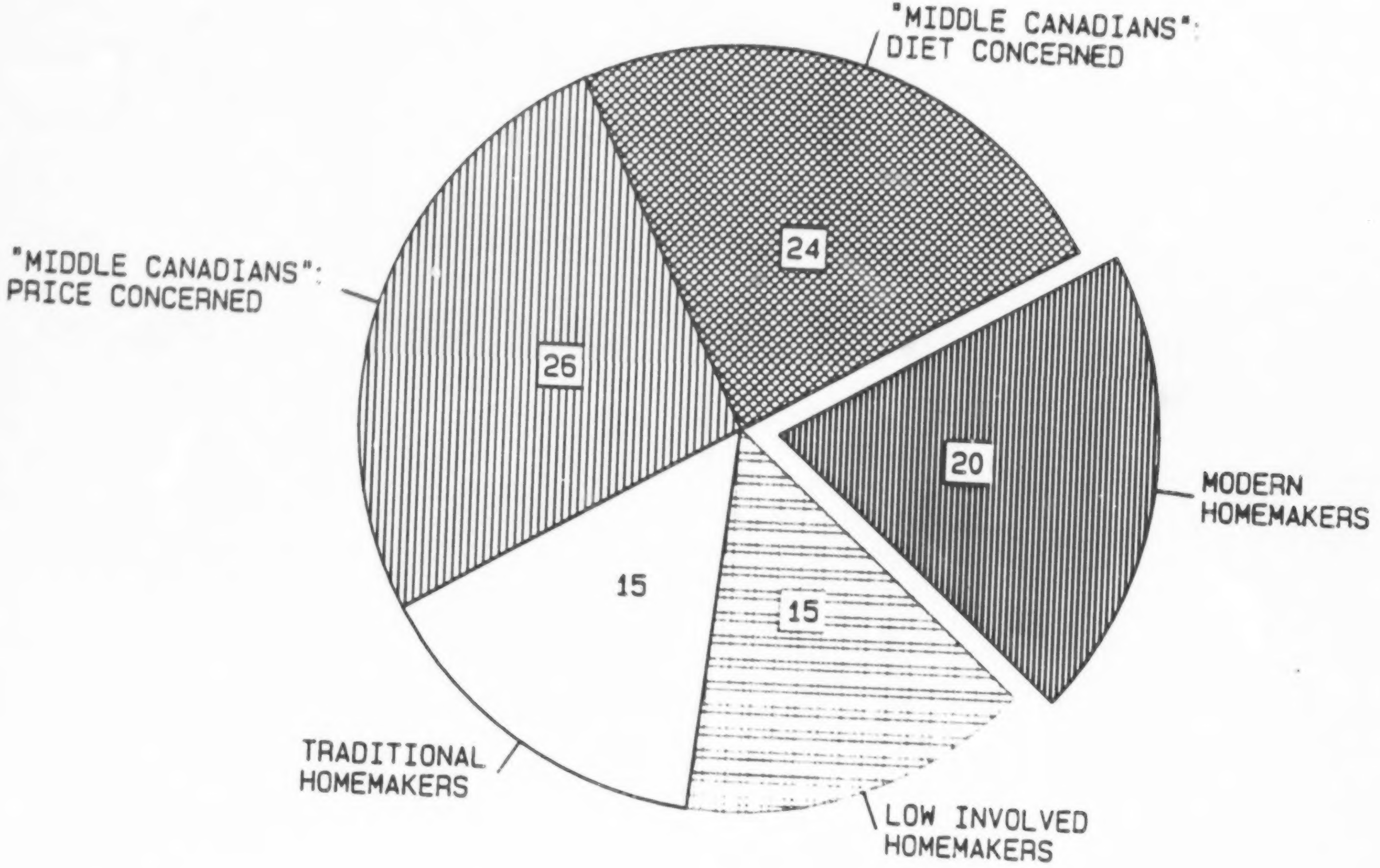
NOTE: I) SCORING SYSTEM IS STRONGLY AGREE = +5 TO STRONGLY DISAGREE = +1
II) HEAVY PORK USER = 20%+ OF MEAT PURCHASES
LIGHT PORK USER = 5% - 10% OF MEAT PURCHASES

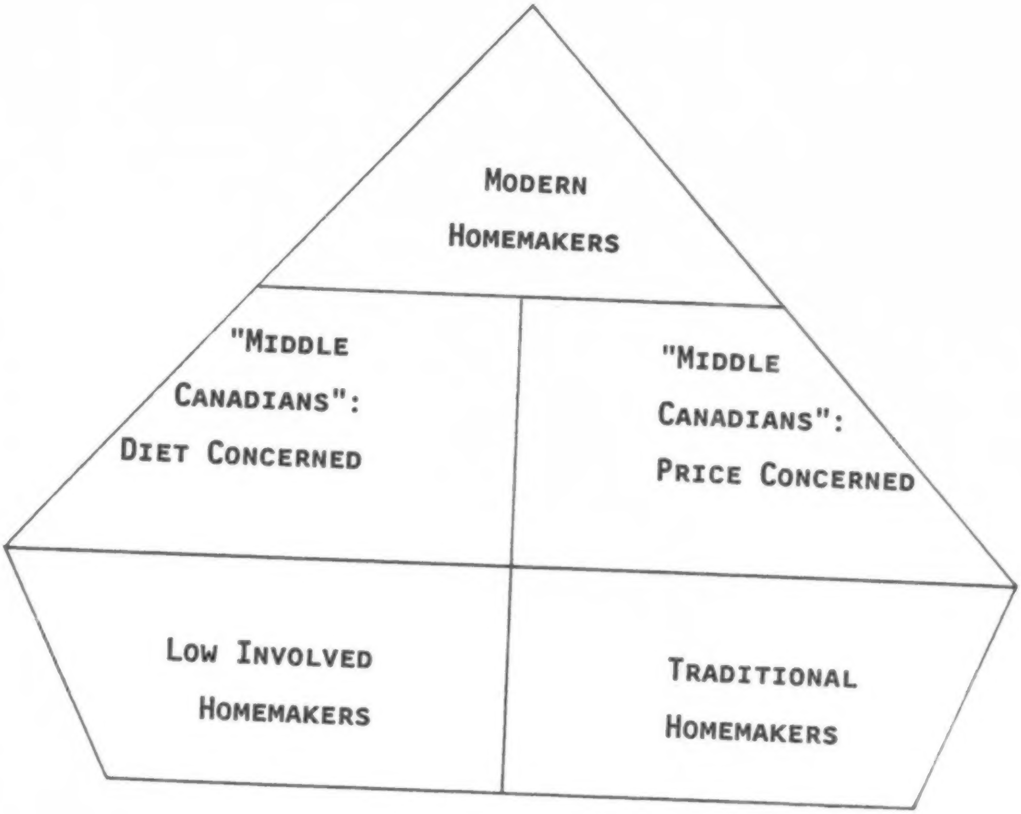
☐ = RELATIVELY HIGH

FACTORS INVOLVED IN DETERMINING COOKING/SHOPPING TYPOLOGY (IN NO PARTICULAR ORDER)

1. Experimentalism
2. Health Concerns
3. Price Concerns
4. Time Constraints
5. Belief in Branded Products
6. Interest in Variety
7. Menu/Shopping Planning
8. Acceptance of Convenience Foods
9. Interest in Fresh Foods

COOKING/SHOPPING TYPOLOGY




MODERN HOMEMAKERS
"MIDDLE CANADIANS": DIET CONCERNED
"MIDDLE CANADIANS": PRICE CONCERNED
LOW INVOLVED HOMEMAKERS
TRADITIONAL HOMEMAKERS

MODERN HOMEMAKERS

- THESE HOMEMAKERS ARE INVOLVED IN WHAT THEY DO. THEY ARE OPINION LEADERS AND, AS SUCH, GENERALLY THE MOST INTERESTING GROUP TO STUDY.

- THEY LEAD BUSY LIVES BUT NEVERTHELESS REMAIN INTERESTED IN:
  - HEALTH/DIET
  - ANYTHING NEW
  - FROZEN FOODS
  - PRICE/QUALITY ISSUES
  - VARIETY

  THEY ARE "CONCERNED" HOMEMAKERS.

- GENERALLY, THEY ARE:
  - FAIRLY WELL OFF
  - YOUNGER (25 - 44 YEARS)
  - BETTER EDUCATED

- CURRENTLY, THEY ARE SLIGHTLY ABOVE AVERAGE USERS OF PORK, HAM AND FISH/SEAFOOD BUT SEE THEMSELVES CUTTING DOWN ON PORK AND BEEF USAGE IN FAVOUR OF CHICKEN AND FISH.

"MIDDLE CANADIANS": PRICE CONCERNED

- THESE HOMEMAKERS ARE CAREFUL SHOPPERS. THEY CHECK PRICES AND, IF IT MAKES SENSE TO THEM, THEY ARE PREPARED TO BUY BRANDS OTHER THAN THEIR REGULAR ONES. THEY ARE PROBABLY RELATIVELY HEAVY BUYERS OF STORE BRANDS. THEY ARE BUSY PEOPLE, FINDING MEAL PREPARATION TIME SQUEEZED. THEY SHOW ONLY A LIMITED AMOUNT OF ADVENTURE IN THEIR COOKING HABITS. WHEN INCOME AND EXPERIENCE ALLOW, THESE HOMEMAKERS WILL POSSIBLY JOIN THE OPINION LEADER GROUP (MODERN HOMEMAKERS).

- GENERALLY, THEY ARE:

  - YOUNG (18 - 34 YEARS)
  - REASONABLY WELL-OFF
  - WELL EDUCATED
  - WORKING
  - HAVE YOUNG CHILDREN

- THEY ARE GENERALLY VERY "NORMAL" IN THEIR MEAT USAGE PATTERNS (SLIGHTLY ABOVE AVERAGE USERS OF CHICKEN) AND SEE THEMSELVES DECREASING THEIR BEEF USAGE AND INCREASING THEIR CHICKEN AND FISH USAGE. NO OVERALL CHANGE ANTICIPATED IN THEIR PORK USAGE.

"MIDDLE CANADIANS": DIET CONCERNED

- THESE HOMEMAKERS DISPLAY CONSERVATIVE TRENDS. THEY HAVE TIME FOR FOOD PREPARATION AND SHOW GENERAL INTEREST IN LIGHTER MEAT, FRESH FOOD, LIMITING CHOLESTEROL AND OTHER DIETARY CONCERNS. THEY ARE NOT PARTICULARLY EXPERIMENTAL.

- GENERALLY, THEY ARE:

  - OLDER (45+ YEARS)
  - OF AVERAGE MEANS
  - LESS WELL EDUCATED
  - MORE LIKELY THAN OTHER GROUPS TO BE FRENCH SPEAKING

- THEY ARE LARGELY AVERAGE IN THEIR MEAT USAGE BUT ANTICIPATE CUTTING BACK ON PORK IN FAVOUR OF CHICKEN AND FISH.

TRADITIONAL HOMEMAKERS

- THESE HOMEMAKERS TEND TO RESIST CHANGE. THEY ARE CONSERVATIVE IN THEIR HABITS, AND HAVE EVERY INTENTION OF REMAINING THIS WAY.

- GENERALLY, THEY ARE:

  - OLDER
  - RETIRED
  - LIVING ON LOW INCOMES
  - LESS WELL EDUCATED

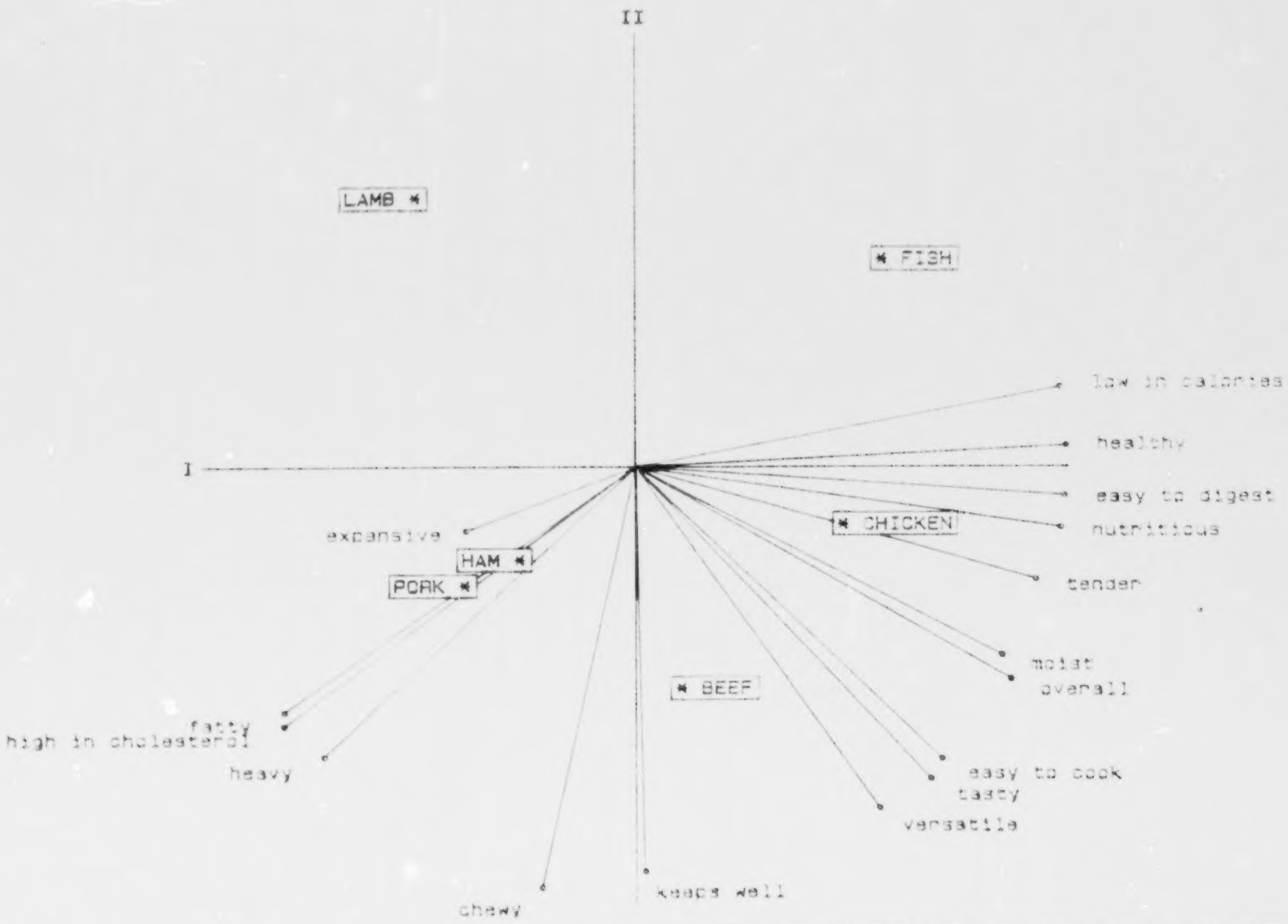
- PORK AND BEEF TEND TO BE POPULAR WITH THESE HOMEMAKERS, LESS SO FISH/SEAFOOD. NOT SURPRISINGLY, THEY DO NOT FORESEE CHANGING THEIR CURRENT HABITS VERY MUCH.

LOW INVOLVED HOMEMAKERS

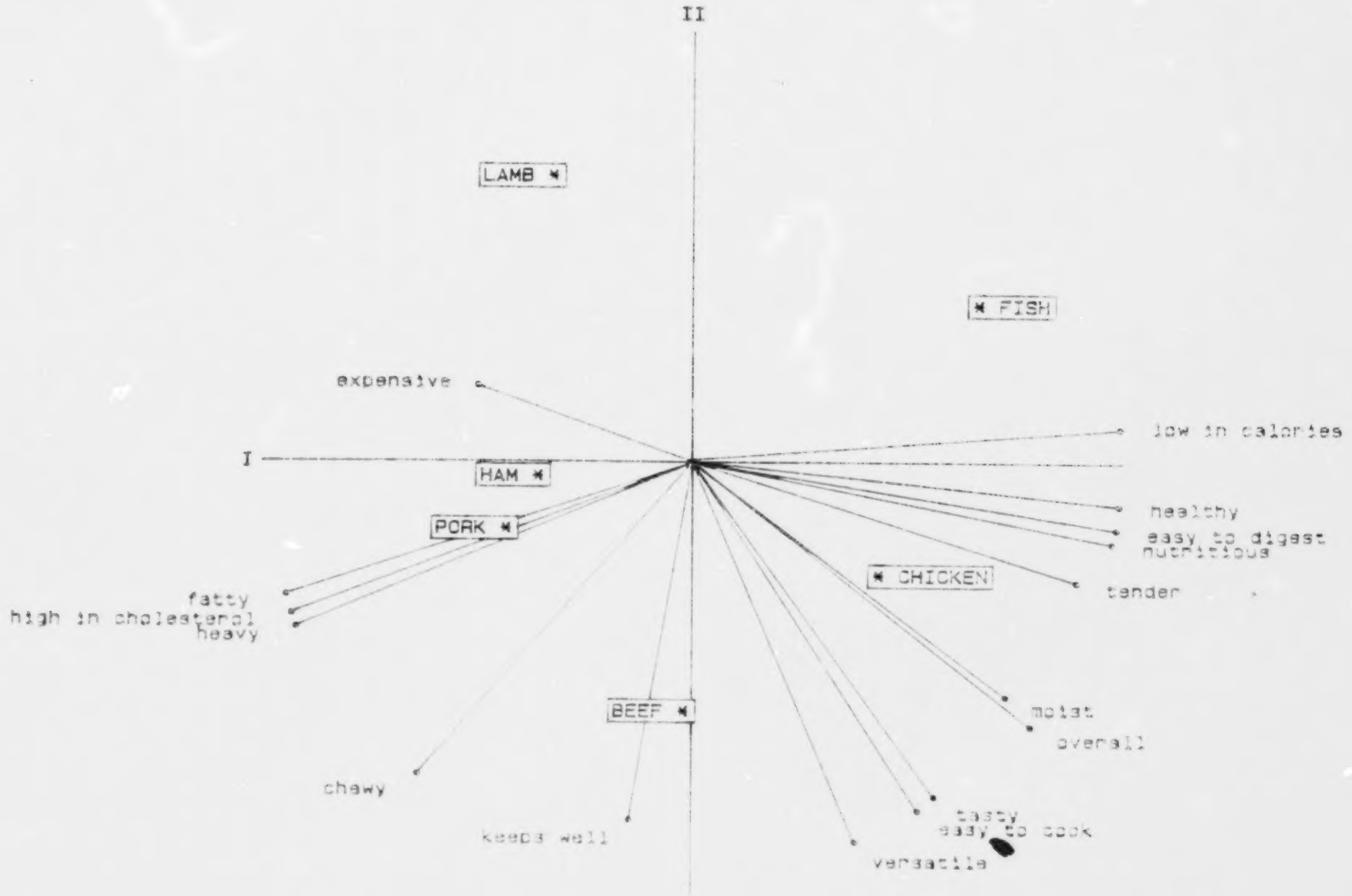
NOTHING ABOUT THE HOMEMAKING EXPERIENCE IS VERY INTERESTING TO THESE PEOPLE. AND AS THEY ARE NOT VERY ADVENTUROUS INDIVIDUALS (AT LEAST AS FAR AS COOKING AND SHOPPING GOES), THEY ARE NOT GOING TO GO OUT OF THEIR WAY TO MAKE IT INTERESTING. THEY EAT OUT A LOT, ARE NOT PARTICULARLY CONCERNED ABOUT PRICES AND DO NOT FEEL GUILTY ABOUT EATING CONVENIENCE FOODS.

- GENERALLY, THEY ARE:
    - EITHER YOUNG (18 - 24 YEARS) OR OLD (65+ YEARS)
    - OF AVERAGE MEANS
    - AVERAGELY WELL EDUCATED
    - SINGLE OR SEPARATED/DIVORCED/WIDOWED
    - WORKING
    - LESS LIKELY THAN AVERAGE TO HAVE CHILDREN AT HOME
- THEY EAT BEEF AND HAM, BUT NOT PORK AND FISH/SEAFOOD. THEY DO THINK THEY MIGHT EAT MORE FISH IN THE FUTURE.

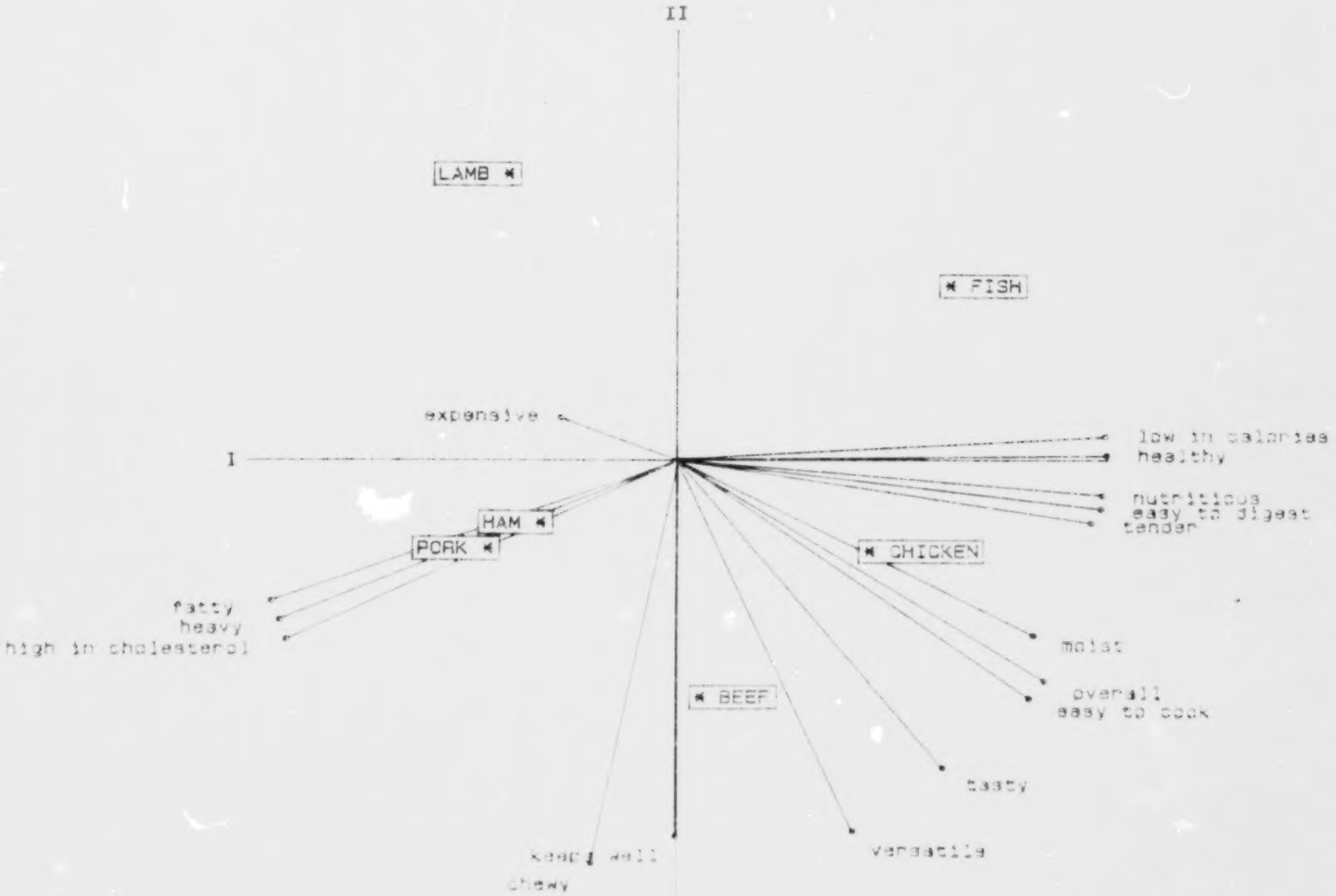
MODERN HOMEMAKERS
MEAT PERCEPTUAL MAP



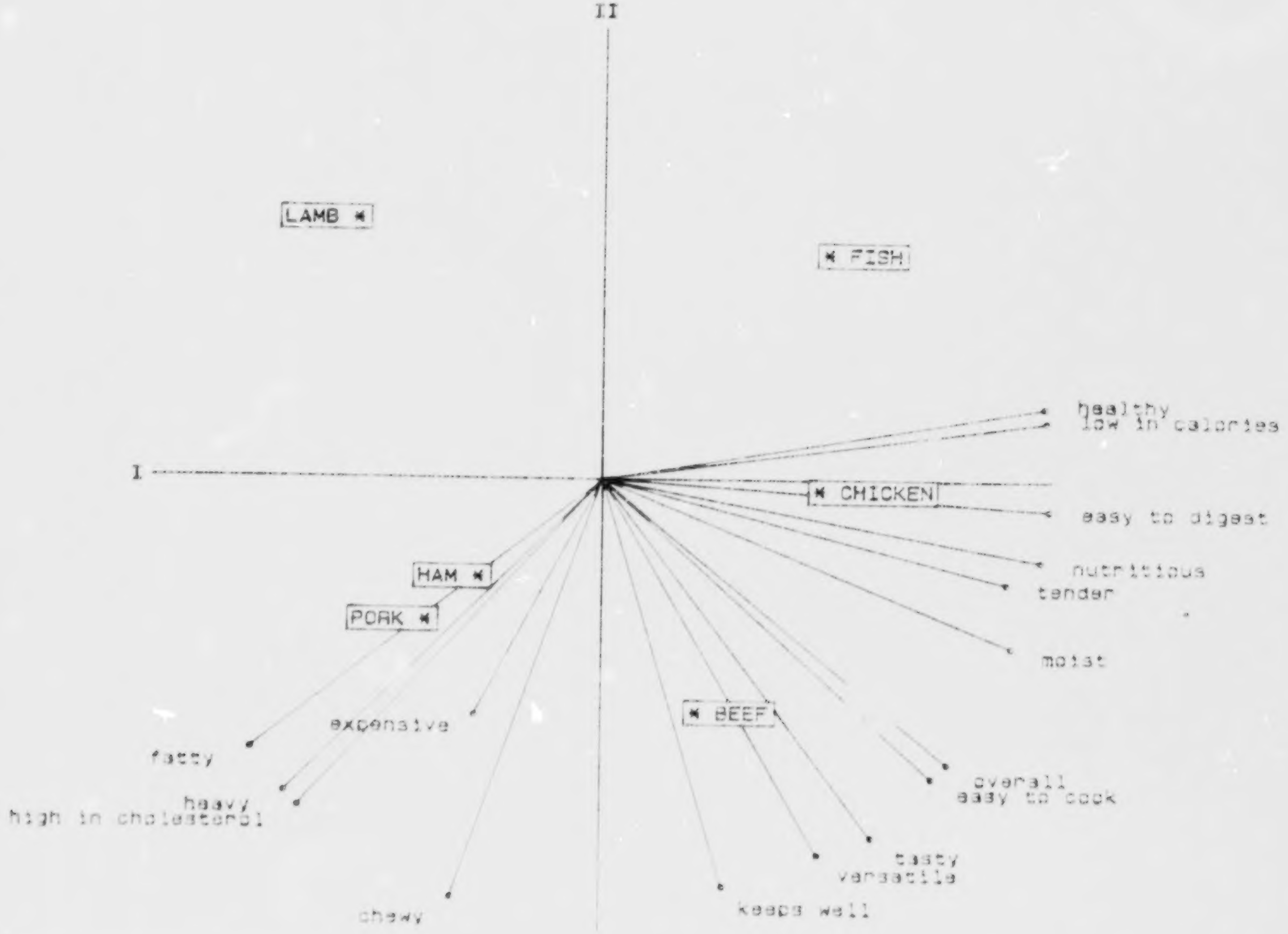
MIDDLE CANADIANS: PRICE CONCERNED MEAT PERCEPTUAL MAP



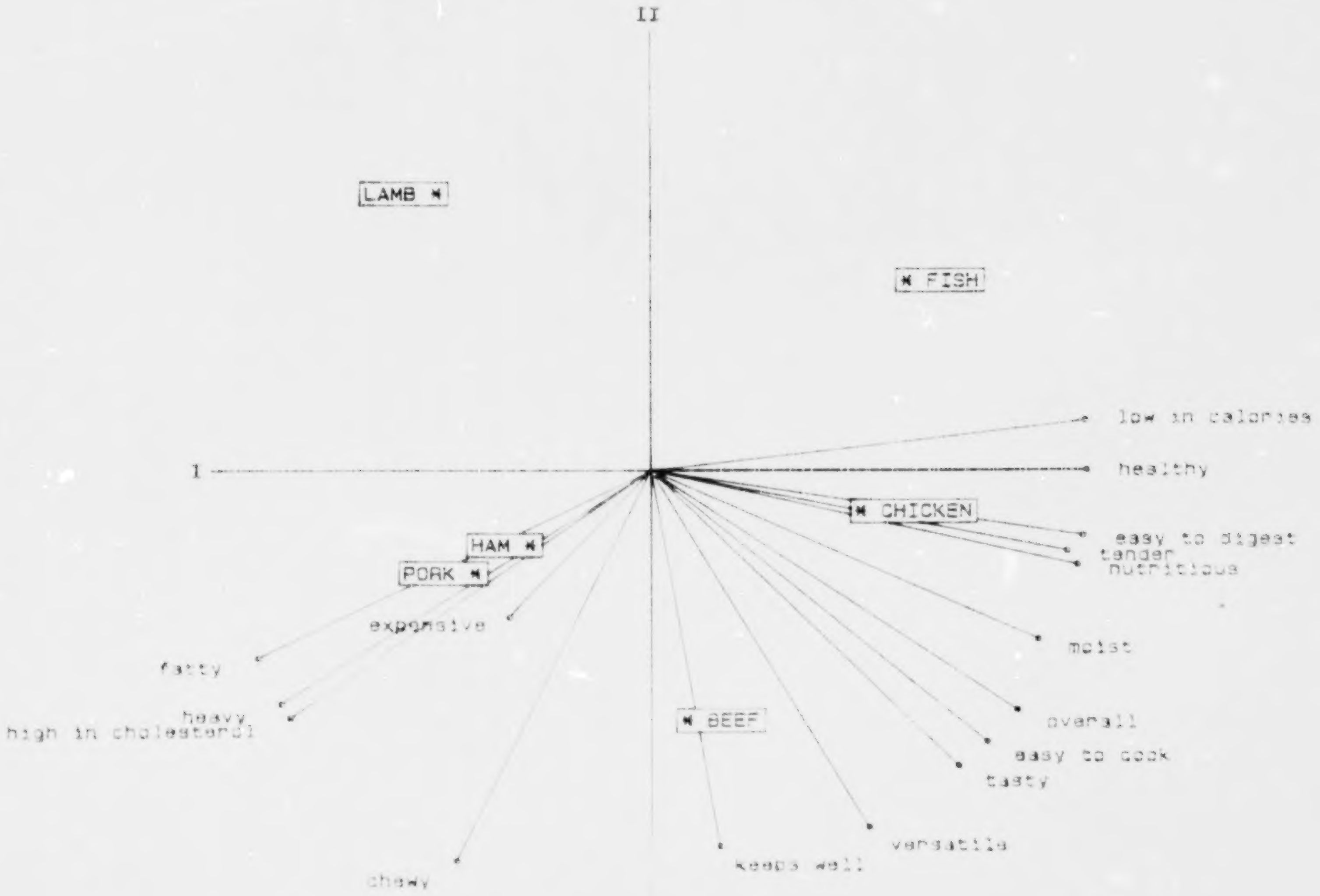
MIDDLE CANADIANS: DIET CONCERNED MEAT PERCEPTUAL MAP



TRADITIONAL HOMEMAKERS MEAT PERCEPTUAL MAP

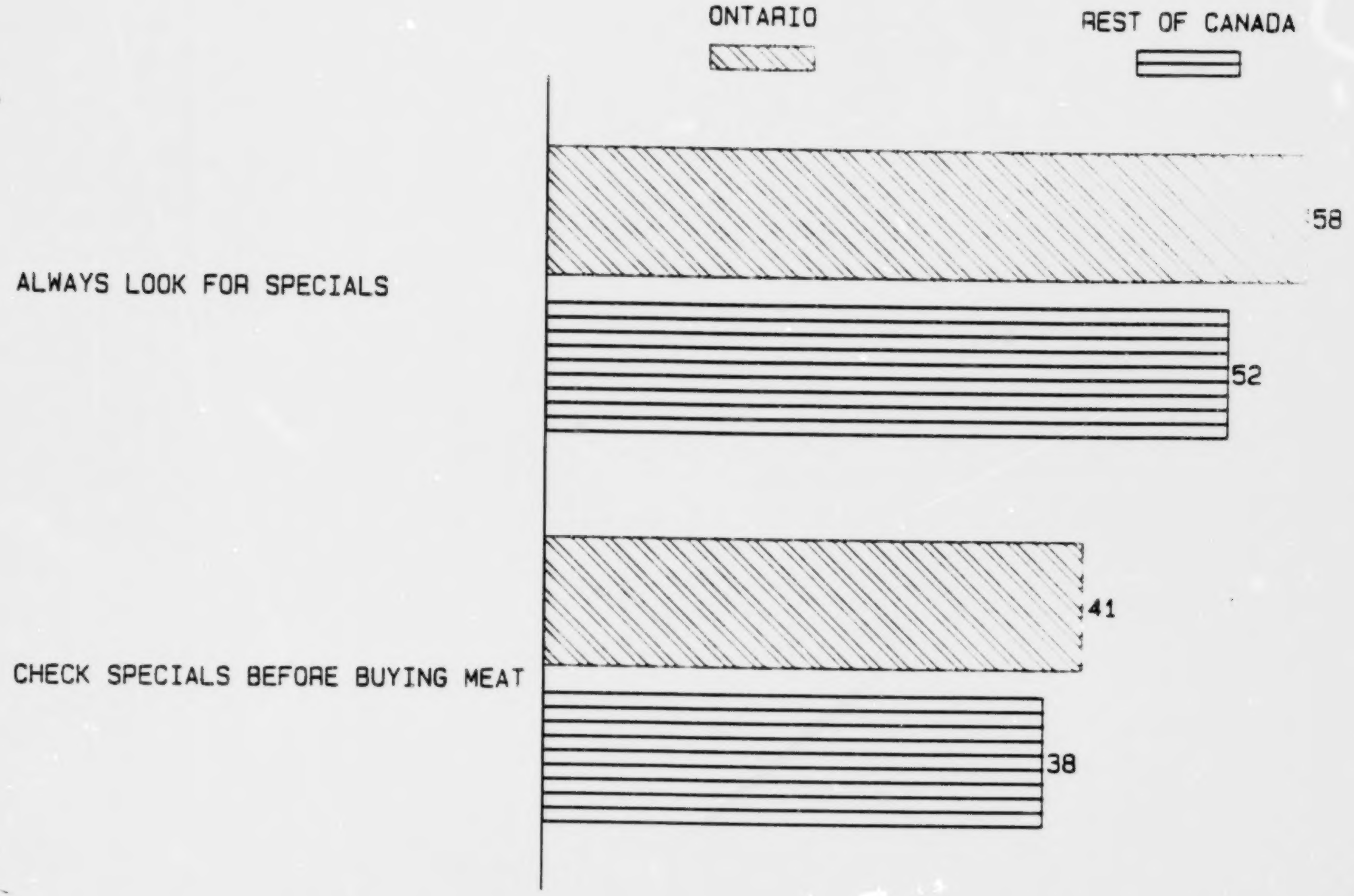


LOW INVOLVED HOMEMAKERS
MEAT PERCEPTUAL MAP



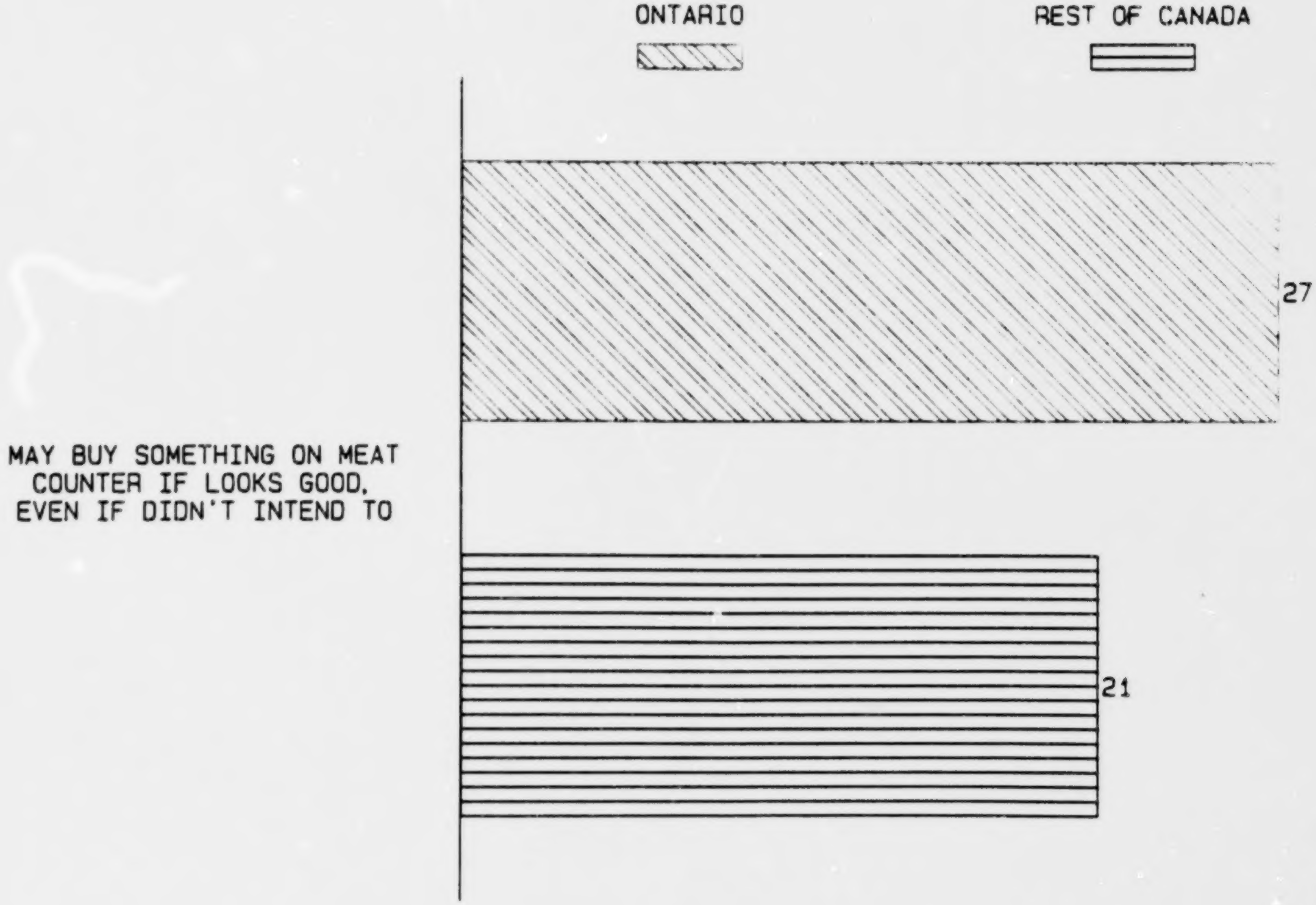
MARKETING ISSUES: SPECIALS

% AGREE STRONGLY



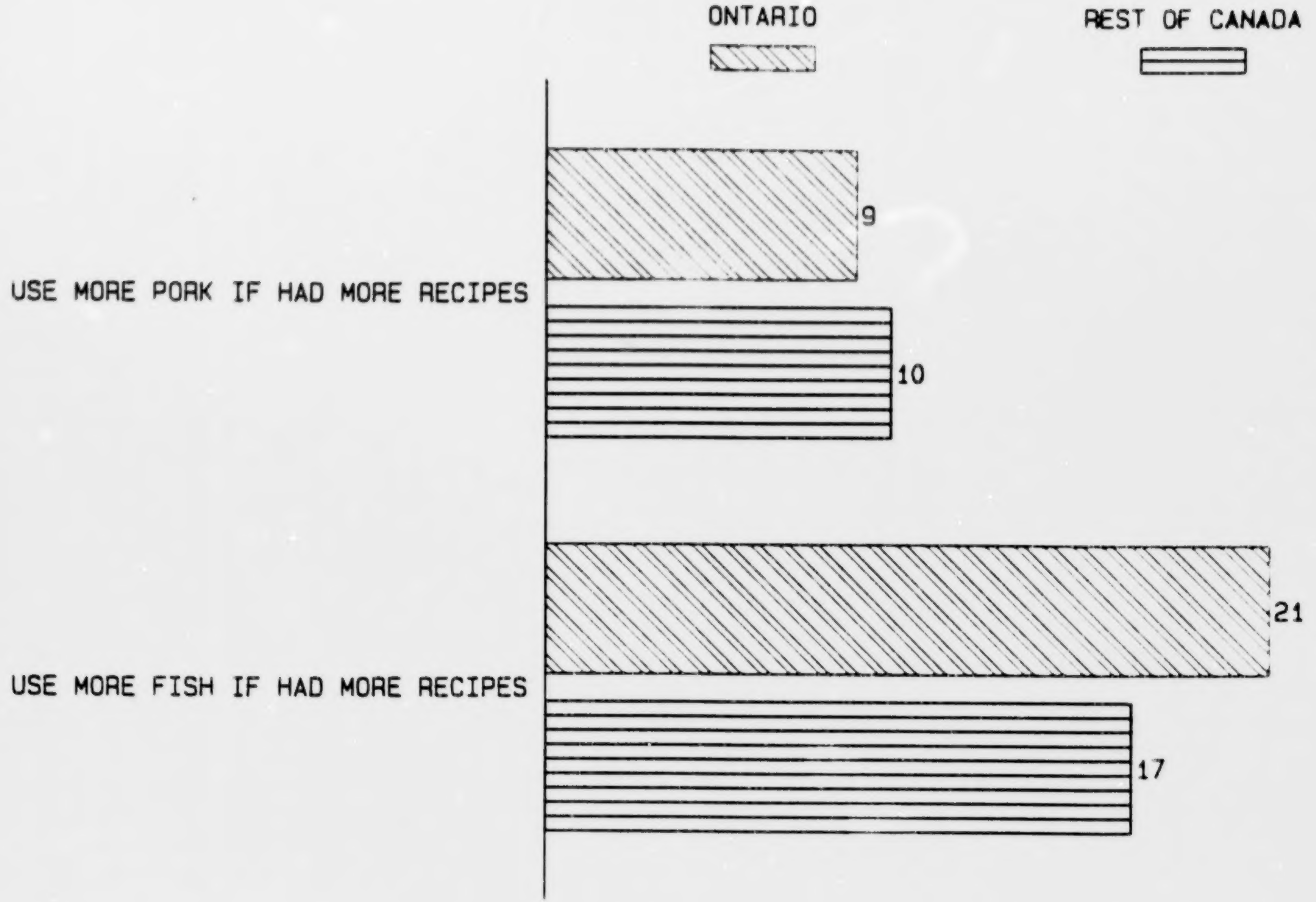
MARKETING ISSUES: SPONTANEITY OF PURCHASE

% AGREE STRONGLY



MARKETING ISSUES: RECIPES

% AGREE STRONGLY



7. FUTURE TRENDS IN MEAT SERVING

Table Reference

- Generally, Canadian homemakers, as would be expected, do not foresee making major changes to their current meat serving patterns. Nevertheless, certain trends are anticipated:

  - a move away from fresh pork, ham and beef
  - a move to more usage of chicken and fish.

  These anticipated trends are, of course, in line with current marketplace experience and thus, in reality, represent a continuation of current patterns. T68

- Less future use of fresh pork is expected in all parts of Canada except the Atlantic provinces. The biggest move away from fresh pork usage was expected by residents of the Prairies and British Columbia. T69

- Both current heavy fresh pork users and light fresh pork users expect to use less fresh pork in the future. Further, the homemakers who are most likely to move away from fresh T70

Table Reference

PORK ARE MODERN HOMEMAKERS AND "MIDDLE CANADIANS": DIET CONCERNED. THE MAIN REASON FOR THEIR POTENTIALLY USING LESS FRESH PORK IS RELATED TO HEALTH/NUTRITION. T72

- MORE SPECIFICALLY, THE KEY ISSUES POTENTIALLY LEADING TO LESS USAGE OF PORK ARE:

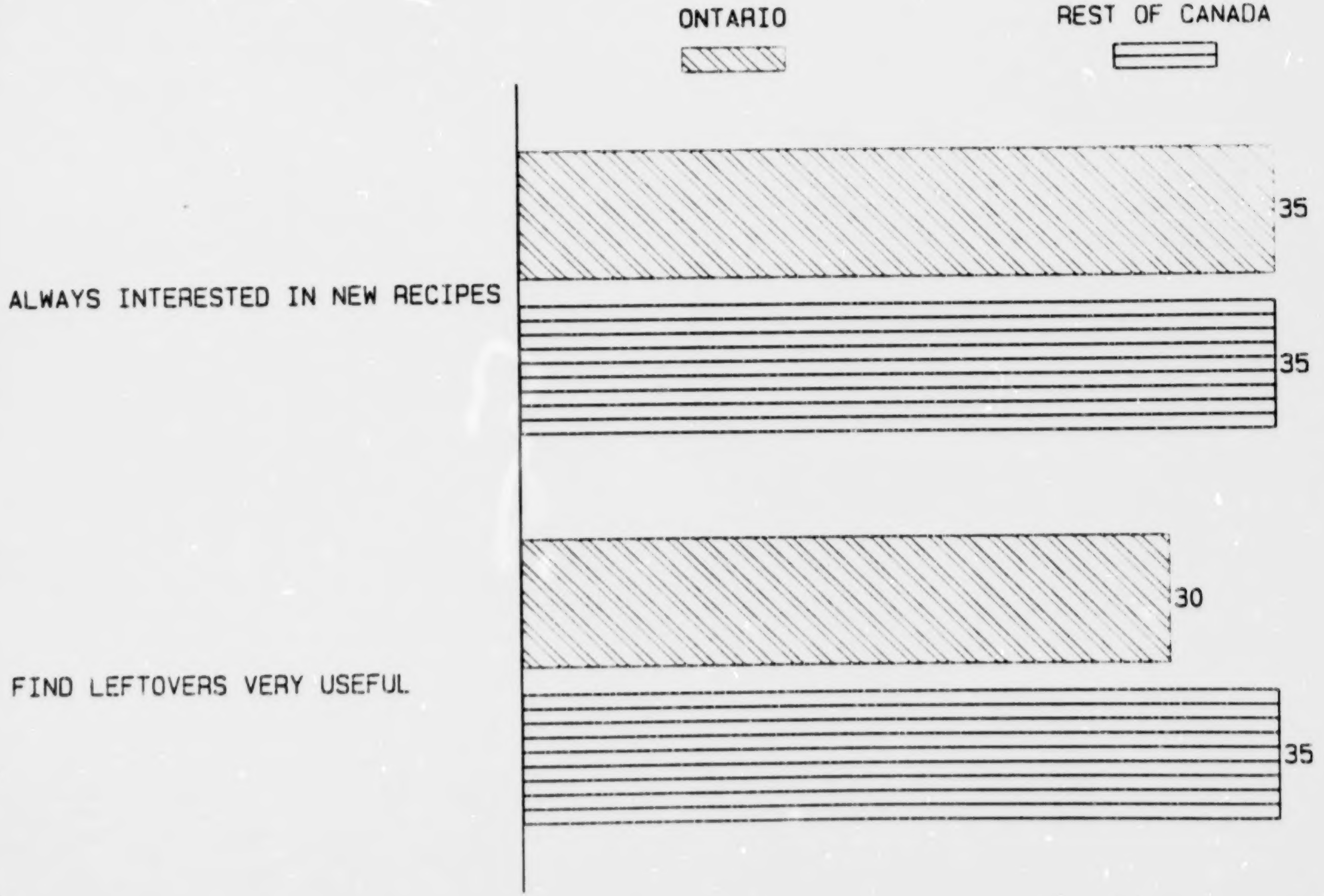
  - "TOO MUCH FAT"
  - CHOLESTEROL T73

BY CONTRAST, FOR BEEF THE KEY ISSUES ARE GENERAL HEALTH/DIET REASONS AND PRICE. T74

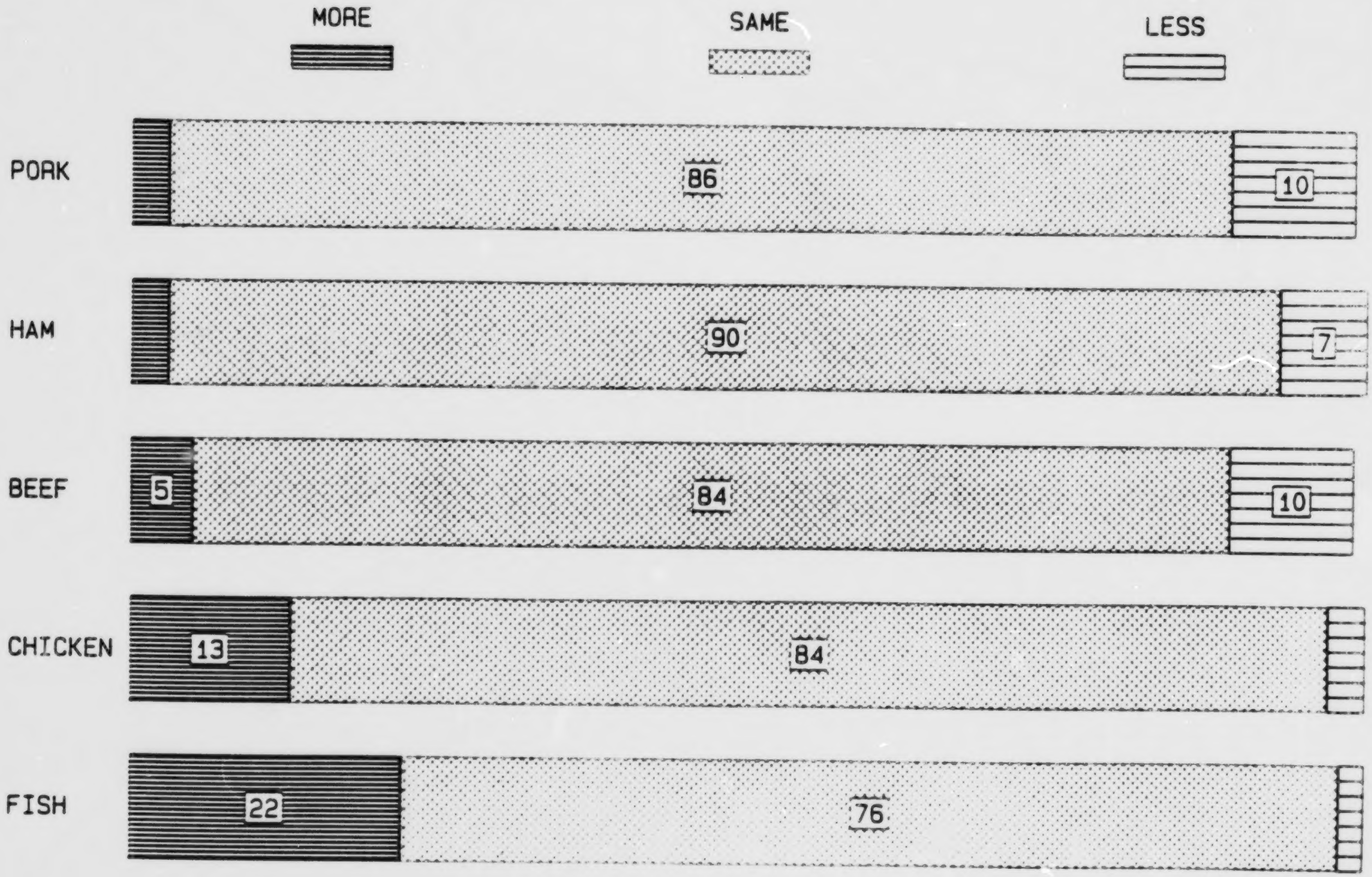
- FOR HAM, THE KEY ISSUES ARE AGAIN HEALTH RELATED BUT ALSO THE "SALTINESS" OF THE MEAT IS A FACTOR. T75

MARKETING ISSUES: RECIPES AND LEFTOVERS

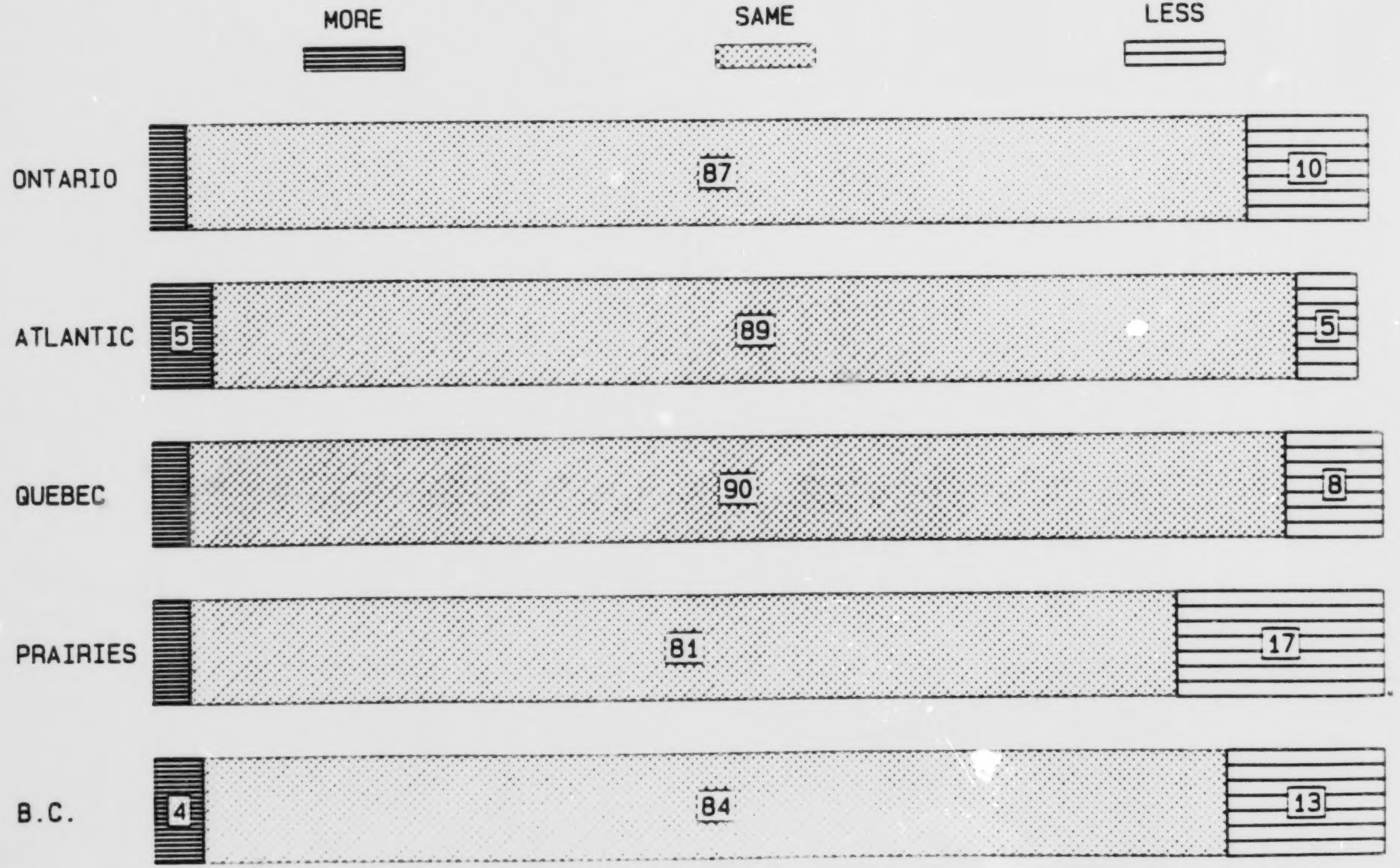
% AGREE STRONGLY



FUTURE TRENDS IN MEAT SERVING



FUTURE TREND IN PORK SERVING



.....REGARDLESS OF THE AMOUNT OF FRESH PORK EATEN NOW, A DECLINE IN FRESH PORK EATING IS ANTICIPATED.

.....BUT LIGHTER PORK USERS PARTICULARLY EXPECT TO EAT MORE FISH.

	HEAVY PORK USERS	MEDIUM PORK USERS	LIGHT PORK USERS
WILL EAT MORE FRESH PORK	5%	3%	2%
LESS FRESH PORK	11	9	9
WILL EAT MORE FISH	13	23	23
LESS FISH	9	2	1

.....FURTHERMORE A DECLINE IN FRESH PORK EATING IS ANTICIPATED REGARDLESS OF THE LEVEL OF CONSUMPTION OF OTHER MEATS.

	WILL EAT......	
	MORE FRESH PORK	LESS FRESH PORK
HEAVY BEEF EATER	4%	10%
LIGHT BEEF EATER	3	10
HEAVY CHICKEN EATER	3	11
LIGHT CHICKEN EATER	3	9
HEAVY HAM EATER	4	7
LIGHT HAM EATER	3	10
HEAVY FISH EATER	2	12
LIGHT FISH EATER	4	10

.....PEOPLE LIVING IN THE WEST SEEM MOST LIKELY TO BE CUTTING BACK ON THEIR CONSUMPTION OF FRESH PORK....AND BEEF. THEY ARE EXPECTING TO EAT MORE FISH AND MORE CHICKEN.

.....THOSE OVER THIRTY FIVE ARE MORE LIKELY TO BE CUTTING BACK ON FRESH PORK, WHILE THOSE UNDER THIRTY FIVE ARE MOST LIKELY TO BE EATING MORE FISH.

	REGION					AGE		
	ONTARIO	QUEBEC	PRAIRIES	B.C.	ATLANTIC	UNDER 35	35-54	55 & OVER
PORK								
MORE	3%	3%	3%	4%	5%	6%	2%	1%
LESS	10	8	17	13	5	9	11	12
BEEF								
MORE	5	3	9	5	8	8	5	2
LESS	11	7	13	15	6	10	9	11
HAM								
MORE	3	3	4	5	3	4	4	1
LESS	6	5	10	9	5	6	7	8
CHICKEN								
MORE	13	7	20	20	7	15	13	11
LESS	4	2	1	5	2	3	3	2
FISH								
MORE	19	20	28	29	20	29	20	15
LESS	2	-	6	4	1	1	4	2

ALL HIGHLIGHTED FIGURES INDICATE PERCENTAGES HIGHER THAN THE AVERAGE.

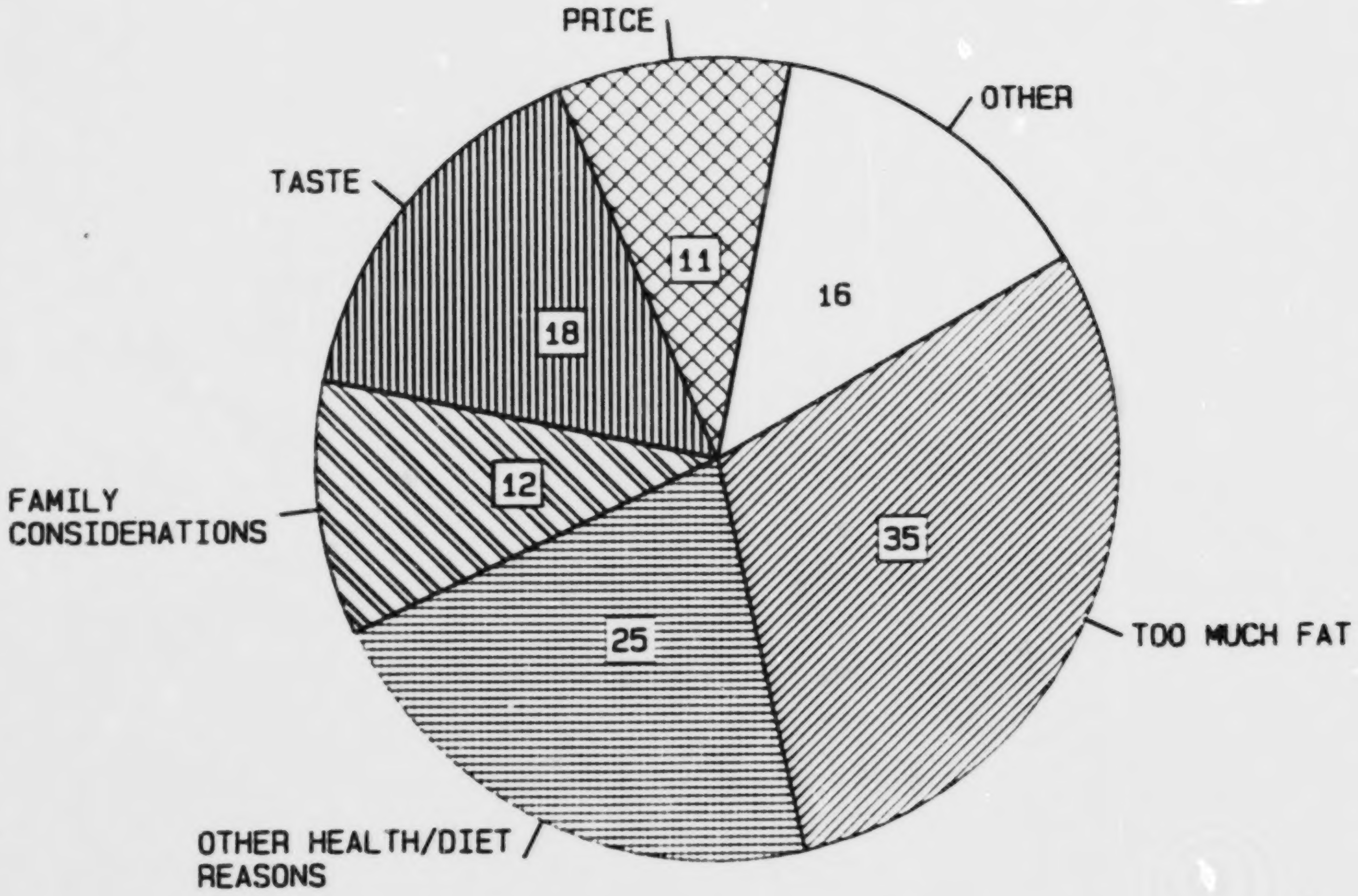
T72

FUTURE MEAT/FISH SERVING

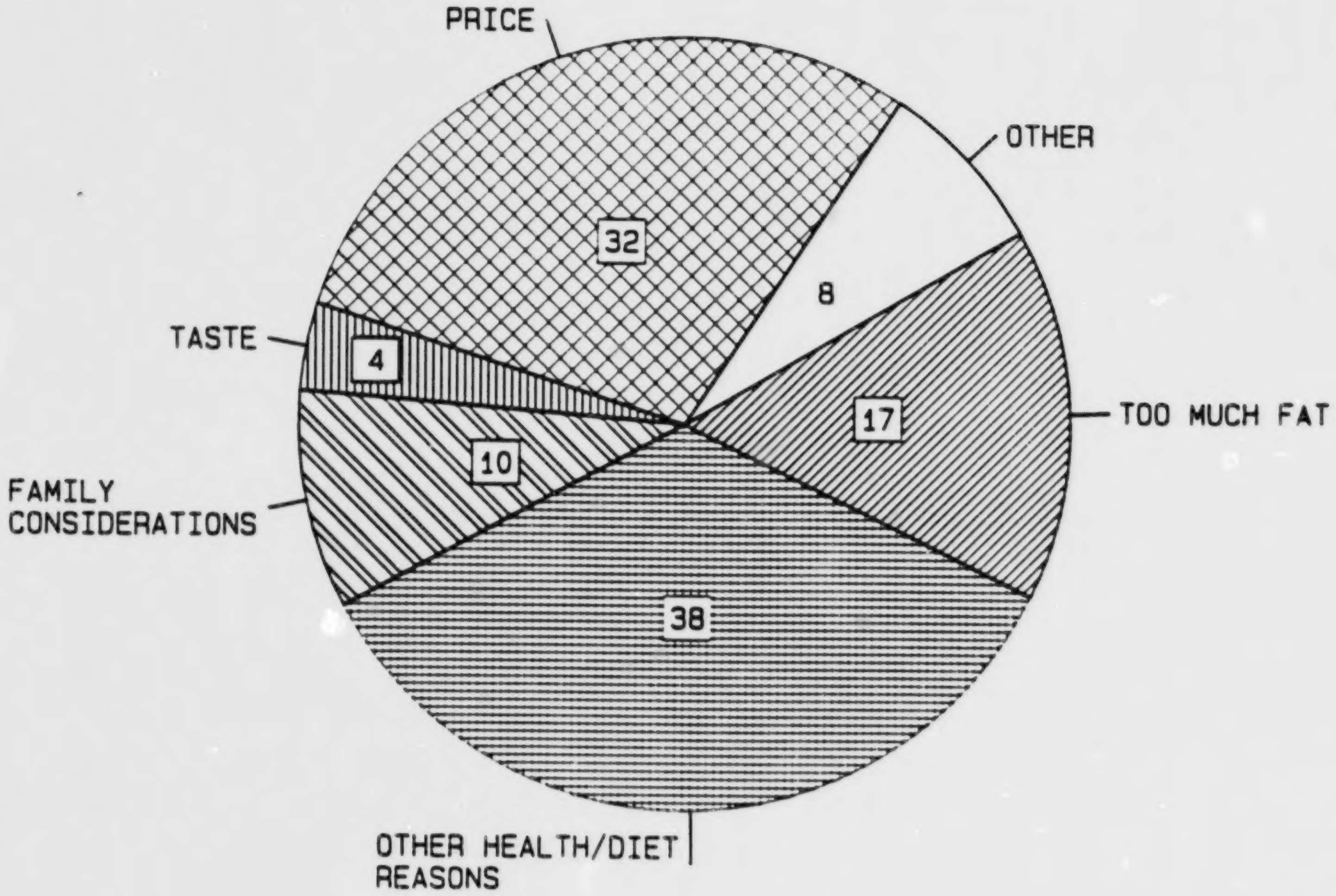
	TRADITIONAL HOMEMAKERS	"MIDDLE CANADIANS": DIET CONCERNED	"MIDDLE CANADIANS": PRICE CONCERNED	LOW INVOLVED HOMEMAKERS	MODERN HOMEMAKERS
	%	%	%	%	%
FRESH PORK					
MORE	1	3	5	1	5
LESS	8	$\boxed{14}$	6	6	$\boxed{16}$
SAME	92	83	88	93	79
HAM					
MORE	2	4	2	4	5
LESS	7	7	8	5	7
SAME	91	90	90	91	88
BEEF					
MORE	2	5	7	5	6
LESS	5	10	$\boxed{12}$	6	$\boxed{14}$
SAME	93	85	80	89	80
CHICKEN					
MORE	8	$\boxed{13}$	$\boxed{15}$	7	$\boxed{19}$
LESS	2	3	3	3	3
SAME	91	84	82	90	78
FISH					
MORE	11	$\boxed{24}$	$\boxed{24}$	$\boxed{18}$	$\boxed{28}$
LESS	1	2	2	1	5
SAME	89	74	74	81	68

☐ = RELATIVELY HIGH

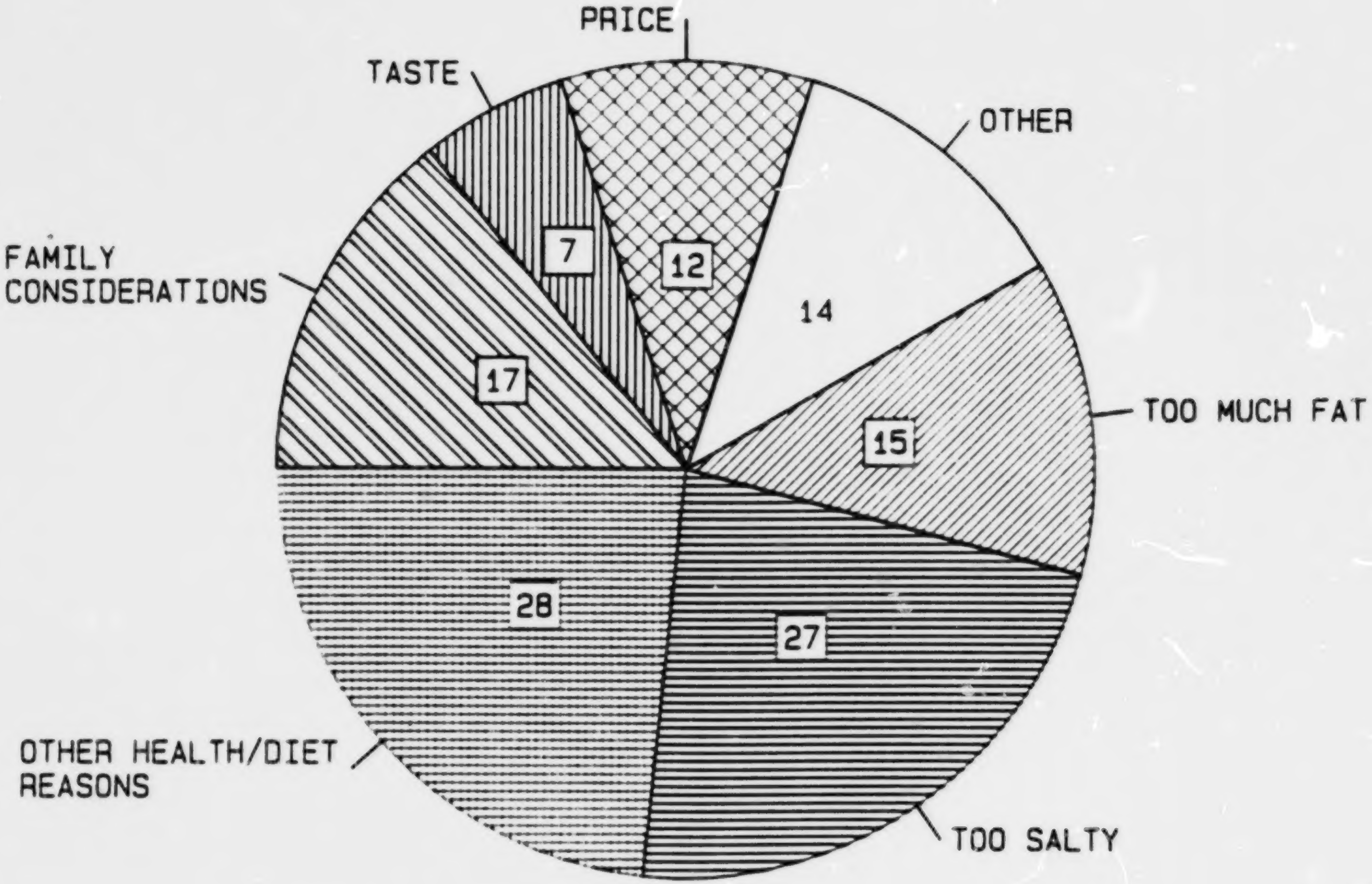
MAIN REASONS FOR SERVING LESS PORK



MAIN REASONS FOR SERVING LESS BEEF



MAIN REASONS FOR SERVING LESS HAM



8. BARRIERS TO USAGE OF FRESH PORK

- THE GREATEST BARRIER OF ALL IS PROBABLY THE GENERALLY LOW ESTEEM IN WHICH PORK IS HELD ACROSS ALL DIMENSIONS ON WHICH MEAT CAN BE EVALUATED:

DIETARY - PORK IS "FATTY", "NOT AS HEALTHY", "HARD TO DIGEST"

APPETITE APPEAL
  - PORK HAS "POORER FLAVOUR", IS LESS GENERALLY LIKED THAN CHICKEN OR BEEF

LACK OF CONVENIENCE
  - LESS EASY TO "DRESS UP"
  - LESS GOOD FOR LEFT OVERS
  - LESS GOOD FOR FREEZING

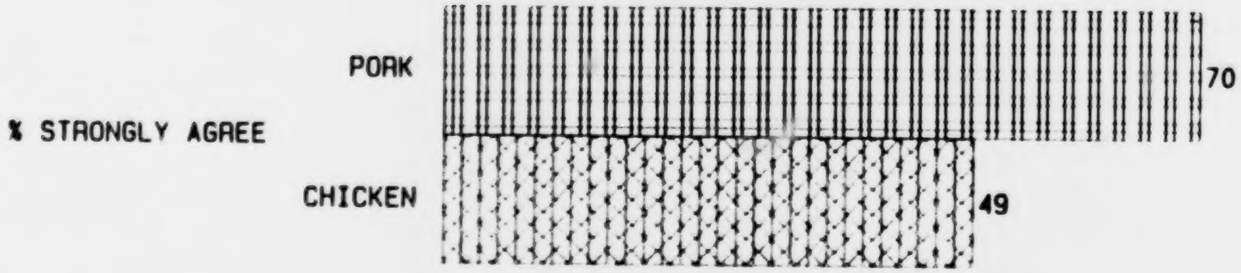
LESS VERSATILE
  - LESS SPECIAL OCCASION-ORIENTED THAN BEEF
  - LESS STAPLE-ORIENTED THAN BEEF OR CHICKEN
  - FEWER CUTS THAN BEEF

Table
Reference

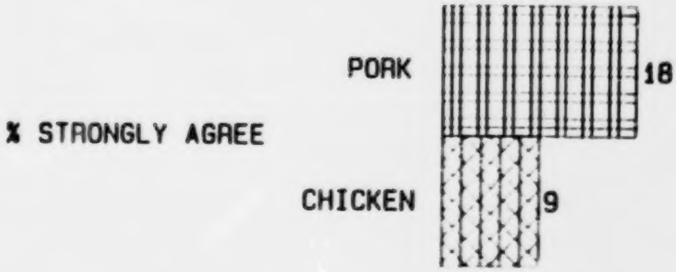
- THE NEED TO COOK PORK THOROUGHLY AND, FOR SOME, A FEELING THAT THE MEAT SHOULD BE AVOIDED IN HOT WEATHER WERE OTHER BARRIERS WHICH MIGHT BE ADDRESSED. T76,77

- EVEN THOUGH THERE IS NO TRICHINOSIS IN CANADIAN PORK, A SMALL PROPORTION OF CONSUMERS FELT IT COULD BE PRESENT. OVERALL, TRICHINOSIS IS NOT A BARRIER TO PORK USAGE.

YOU HAVE TO BE CAREFUL TO COOK IT WELL DONE



IT'S NOT A GOOD IDEA TO EAT IT WHEN THE WEATHER IS HOT



BARRIERS TO PORK CONSUMPTION

ITS NOT A GOOD IDEA TO EAT PORK WHEN THE WEATHER IS HOT.

	TOTAL	ONTARIO	QUEBEC	PRIARIES	BRITISH COLUMBIA	ATLANTIC
AGREE STRONGLY	18%	11%	37%	7%	11%	16%
AGREE SOMEWHAT	20	20	22	17	17	20
HALF & HALF	28	23	18	40	47	34
DISAGREE SOMEWHAT	17	22	12	20	12	17
DISAGREE COMPLETELY	16	23	10	13	13	13

YOU HAVE TO BE CAREFUL TO COOK IT WELL-DONE.

	TOTAL	ONTARIO	QUEBEC	PRIARIES	BRITISH COLUMBIA	ATLANTIC
AGREE STRONGLY	70%	69%	79%	59%	65%	74%
AGREE SOMEWHAT	19	21	15	25	23	13
HALF & HALF	7	6	5	12	11	9
DISAGREE SOMEWHAT	2	4	1	4	1	2
DISAGREE COMPLETELY	1	1	-	-	-	2

Table Reference

9. PROCESSED PORK

9.1 Cold Cuts

- **Consumption**

Usage of cold cuts is prevalent right across
the country. Almost three out of five
households had cold cuts at home in February, T78
1987, and two in every five use them at least
three times a week. T79

Freshly Sliced products are used far more
than vacuum packed, but the Western and
Atlantic provinces use vacuum packed
considerably more than Ontario and Quebec ...
Quebec in particular uses little vacuum T80,T83
product.

Overall, Ontario is the heaviest user of cold T84
cuts and heavy usage is concentrated in
families with children ... other than sliced T85
ham, these families use a lot of bologna,
salamis and luncheon meat. T86

Table Reference

ATTITUDES

IN SELECTING COLD CUTS, CONSUMERS PLACE
FLAVOUR BEFORE ALL ELSE, AND QUITE A WAY
AHEAD OF THEIR NEXT CRITERIA WHICH ARE PRICE
AND THE MEAT IT IS MADE OF. ALTHOUGH,
OBVIOUSLY, FAMILIES WITH CHILDREN PLACE SOME
EMPHASIS ON THE CHILDREN'S PREFERENCES, THIS
CONSIDERATION IS STILL OUT RANKED BY FLAVOUR, T87
PRICE AND THE MEAT INVOLVED. T88

MARKETING DIRECTION

ALTHOUGH COLD CUTS ARE USED FOR ENTERTAINING, THEY ARE USED VERY EXTENSIVELY FOR EVERYDAY FAMILY CONSUMPTION AND THIS IS WHERE THE BULK OF THE VOLUME GOES.

ADVERTISING AND PROMOTIONAL ACTIVITIES SHOULD FOCUS PRIMARILY IN THIS AREA ... WITH THE EMPHASIS ON FLAVOUR.

T78

COLD CUTS

	TOTAL	ONT-ARIO	QUE-BEC	PRAI-RIES	B.C.	ATLAN-TIC
	%	%	%	%	%	%
ANY COLD CUTS SERVED IN LAST SIX MONTHS	88	89	88	80	95	85
FRESHLY SLICED	81	85	86	$\boxed{68}$	85	75
VACUUM PACKED, BRANDED	41	45	$\boxed{20}$	54	50	47
VACUUM PACKED, STORE PACKAGED	30	29	$\boxed{16}$	㊹	33	㊿
ANY COLD CUTS SERVED IN LAST SIX WEEKS	78	77	79	69	88	78
FRESHLY SLICED	71	73	77	$\boxed{56}$	77	66
VACUUM PACKED, BRANDED	33	35	$\boxed{16}$	46	42	41
VACUUM PACKED, STORE PACKAGED	24	22	$\boxed{12}$	35	26	㊺
ANY COLD CUTS IN HOME	57	58	57	52	63	50
FRESHLY SLICED	49	51	55	$\boxed{34}$	51	44
VACUUM PACKED, BRANDED	19	19	$\boxed{10}$	㉙	㉘	19
VACUUM PACKED, STORE PACKAGED	12	9	$\boxed{4}$	22	17	22

○ = RELATIVELY HIGH

□ = RELATIVELY LOW

FREQUENCY OF BUYING COLD CUTS

.....45% OF CANADIAN HOUSEHOLDS BUY FRESHLY SLICED COLD CUTS AT LEAST ONCE A MONTH.

.....BUT ONTARIO AND QUEBEC BUY EVEN MORE FREQUENTLY, WHILE THE WEST AND EASTERN PROVINCES BUY LESS FREQUENTLY, PARTICULARLY THE PRAIRIES.....PROBABLY A QUESTION OF ACCESS. THEY MAKE UP FOR THIS BY INCREASED BUYING OF VACUUM PACKED COLD CUTS.

	FRESHLY SLICED		VACUUM PACKED	
	ONTARIO %	REST OF CANADA %	ONTARIO %	REST OF CANADA %
ONCE A WEEK OR MORE	51	41	16	13
ONCE EVERY 2 WEEKS	17	20	11	14
ONCE A MONTH	14	14	12	11
ONCE EVERY 6 WEEKS	2	3	4	2
ONCE EVERY 2 MONTHS	2	4	2	3
ONCE EVERY 3 MONTHS	2	4	4	3
LESS OFTEN	5	8	16	20
NEVER	7	6	36	34

FREQUENCY OF BUYING FRESHLY SLICED COLD CUTS

	TOTAL	ONT-ARIO	QUE-BEC	PRAI-RIES	B.C.	ATLAN-TIC
	%	%	%	%	%	%
ONCE A WEEK OR MORE	45	51	50	$\boxed{31}$	$\boxed{35}$	42
ONCE EVERY 2 WEEKS	19	17	20	17	22	24
ONCE A MONTH	14	14	12	20	16	10
ONCE EVERY 6 WEEKS	3	2	2	2	5	3
ONCE EVERY 2 MONTHS	4	2	5	4	5	2
ONCE EVERY 3 MONTHS	3	2	2	8	3	1
LESS OFTEN	7	5	5	13	9	7
NEVER	6	7	4	5	6	11

☐ = RELATIVELY LOW

T81

FREQUENCY OF BUYING VACUUM PACKED COLD CUTS

	TOTAL	ONT-ARIO	QUE-BEC		PRAI-RIES		B.C.	ATLAN-TIC
	%	%	%		%		%	%
ONCE A WEEK OR MORE	14	16	8	15	20	47	13	15
ONCE EVERY 2 WEEKS	13	11	7		27		17	13
ONCE A MONTH	11	12	4		14		17	19
ONCE EVERY 6 WEEKS	3	4	1		2		5	2
ONCE EVERY 2 MONTHS	3	2	2		4		5	3
ONCE EVERY 3 MONTHS	3	4	3		6		2	2
LESS OFTEN	18	16	27		13		15	15
NEVER	35	36	㊾		17		25	31

○ = RELATIVELY HIGH

FREQUENCY OF SERVING COLD CUTS

.....FRESHLY SLICED COLD CUTS ARE USED MUCH MORE OFTEN THAN VACUUM PACKED.

.....ONTARIO SERVES FRESHLY SLICED COLD CUTS MORE FREQUENTLY THAN OTHER PROVINCES.

.....BUT THE WEST SERVES VACUUM PACKED COLD CUTS MOST FREQUENTLY, FOLLOWED BY THE ATLANTIC PROVINCES.

	FRESHLY SLICED		VACUUM PACKED	
	ONTARIO	REST OF CANADA	ONTARIO	REST OF CANADA
	%	%	%	%
EVERY DAY OR ALMOST EVERY DAY	24	13	7	6
3-4 TIMES A WEEK	19	16	7	6
1-2 TIMES A WEEK	26	27	13	13
ONCE EVERY 10 DAYS - 2 WEEKS	8	11	8	6
ONCE EVERY 3/4 WEEKS	6	10	7	6
ONCE EVERY 6/8 WEEKS	4	5	7	5
LESS OFTEN	6	11	15	21
NEVER	8	7	38	36

T83

FREQUENCY OF SERVING VACUUM PACKED COLD CUTS

	TOTAL	ONTARIO	QUEBEC	PRAIRIES	B.C.	ATLANTIC
	%	%	%	%	%	%
EVERY DAY OR ALMOST EVERY DAY	6	7	3	13	5	3
3-4 TIMES A WEEK	7	7	1	10	13	6
1-2 TIMES A WEEK	13	13	8	16	16	23
ONCE EVERY 10 DAYS-2 WEEKS	7	8	2	12	9	5
ONCE EVERY 3 WEEKS	2	2	2	1	4	3
ONCE EVERY 4 WEEKS	4	5	2	7	2	8
ONCE EVERY 6 WEEKS	3	4	1	1	5	1
ONCE EVERY 2 MONTHS	3	3	2	3	6	1
LESS OFTEN	19	15	27	18	14	17
NEVER	37	38	52	18	27	33

○ = RELATIVELY HIGH

HEAVINESS OF USAGE OF COLD CUTS

.....BIGGER FAMILIES ARE MORE LIKELY TO USE COLD CUTS MORE OFTEN, BUT AN EVEN MORE IMPORTANT DETERMINANT IS PRESENCE OF CHILDREN IN THE HOUSEHOLD. THREE QUARTERS OF LIGHT COLD CUT USERS HAVE NO CHILDREN AT HOME. A FURTHER MAJOR DEMOGRAPHIC FACTOR LIES IN THE REGIONAL DIFFERENCE.

.....TAKING FRESHLY SLICED AND VACUUM PACKED IN COMBINATION, ONTARIANS ARE MORE LIKELY TO USE COLD CUTS, QUEBECKERS MUCH LESS LIKELY TO DO SO.

	--------COLD CUT USERS----------		
	HEAVY	MEDIUM	LIGHT
	%	%	%
ONTARIO	42	36	28
QUEBEC	16	31	33
PRAIRIES	20	14	19
BRITISH COLUMBIA	13	10	14
ATLANTIC	8	9	6

.....FROM A PSYCHOGRAPHIC PERSPECTIVE, IT IS THE "MODERN" CANADIAN WHO USES COLD CUTS MOST OFTEN, WHILE "TRADITIONAL" AND "DIET ORIENTED" CANADIANS USE THEM LEAST OFTEN. HOWEVER, DIFFERENCES IN THIS REGARD ARE NOT LARGE.

TYPES OF COLD CUTS IN HOME NOW

.....SLICED HAM IS BY FAR THE MOST COMMONLY USED AND WAS IN TWO-FIFTHS OF HOUSEHOLDS, MOST IN QUEBEC, (47%), LEAST IN THE ATLANTIC PROVINCES (30%).

.....BUT SALAMIS, LUNCHEON MEATS AND BOLOGNA ARE PARTICULARLY COMMON IN HEAVY USER HOUSEHOLDS AND ALSO FOUND MORE IN HOUSEHOLDS WITH CHILDREN.

	---USERS OF COLD CUTS---		
	HEAVY %	MEDIUM %	LIGHT %
SLICED HAM	54	45	23
SLICED PORK	4	3	1
PASTRAMI AND SMOKED/CORNED BEEF	16	18	10
ALL TYPES OF SALAMIS	25	14	8
BOLOGNA	22	13	6
SLICED LUNCHEON MEAT	22	10	5
SLICED BEEF	5	4	3
NONE	13	21	50

	---PRESENCE OF CHILDREN---	
	NO CHILDREN %	AT LEAST ONE %
SLICED HAM	36	48
SLICED PORK	2	3
PASTRAMI & SMOKED/CORNED BEEF	14	15
ALL TYPES OF SALAMIS	14	18
BOLOGNA	10	18
SLICED LUNCHEON MEAT	10	15
SLICED BEEF	3	4
NONE	33	22

ALL PERCENTAGES HIGHLIGHTED BY MEANS OF CIRCLES OR BOXES ARE HIGHER THAN THE AVERAGE.

TYPES OF COLD CUTS AND CANNED MEAT BOUGHT MOST OFTEN

	TOTAL	ONTARIO	QUEBEC	PRAIRIES	B.C.	ATLANTIC
	%	%	%	%	%	%
SLICED HAM	53	52	65	46	47	44
PASTRAMI AND SMOKED/ CORNED BEEF	12	10	12	18	16	6
ALL TYPES OF SALAMIS	11	12	8	12	15	13
BOLOGNA	10	10	5	12	12	20
SLICED LUNCHEON MEAT	9	9	6	12	12	5
SLICED BEEF	4	3	3	6	3	4
CANNED HAM	3	2	2	4	3	7
CANNED LUNCHEON MEAT	3	3	2	4	2	8
SLICED PORK	1	2	*	1	1	-
NONE	2	4	3	1	1	3

*LESS THAN 0.5%

ALL PERCENTAGES HIGHLIGHTED BY MEANS OF CIRCLES OR BOXES ARE HIGHER THAN THE AVERAGE.

RELATIVE IMPORTANCE OF COLD CUT ATTRIBUTES

	TOTAL	ONTARIO	QUEBEC	PRAIRIES	B.C	ATLANTIC
GOOD FLAVOUR	5.9	5.9	6.2	5.6	6.0	5.6
REASONABLE PRICE	4.7	4.7	4.6	4.7	4.7	4.9
THE MEAT IT'S MADE OF	4.6	4.7	4.2	4.9	4.8	4.4
A BRAND I KNOW	3.5	3.5	3.6	3.6	3.2	3.4
GETTING A VARIETY OF CUTS	3.3	3.2	3.4	2.9	3.4	3.4
AMOUNT OF FAT	3.2	3.0	3.1	3.5	3.1	3.2
CHILDREN LIKE IT	2.7	2.7	2.8	2.6	2.9	2.9

MEAN SCORES:
MOST IMPORTANT = +7
SECOND MOST IMPORTANT = +6
THIRD MOST IMPORTANT = +5
FOURTH MOST IMPORTANT = +4
NOT CHOSEN IN TOP FOUR = +2

RELATIVE IMPORTANCE OF COLD CUT ATTRIBUTES

	NO CHILDREN	AT LEAST ONE CHILD
GOOD FLAVOUR	6.0	5.8
REASONABLE PRICE	4.7	4.7
THE MEAT IT'S MADE OF	4.7	4.5
A BRAND I KNOW	3.7	3.2
GETTING A VARIETY OF CUTS	3.2	3.3
AMOUNT OF FAT	3.4	2.9
CHILDREN LIKE IT	2.1	3.5

MEAN SCORES:
MOST IMPORTANT = +7
SECOND MOST IMPORTANT = +6
THIRD MOST IMPORTANT = +5
FOURTH MOST IMPORTANT = +4
NOT CHOSEN IN TOP FOUR = +2

Table Reference

9.2 Sausages and Wieners

- **Consumption**

Sausage and Wiener consumption is prevalent in most Canadian households. Almost two thirds serve at least once every two weeks T89
and three quarters serve at least once a month. The Atlantic region has the highest consumption of sausages, and especially T90
wieners.

The critical factor in sausage consumption is the presence of children in the household. T91

Psychographically, it is the traditionally-oriented consumer that is the heaviest consumer of sausages and wieners, despite the fact the this group does not contain a disproportionately high number of children. T96

- **Attitudes**

Flavour is the key determinant of sausage selection followed ... but a long way behind ... by price and the meat the sausage is made T97

Table Reference

OF. FAT CONTENT AND NUTRITIONAL VALUES SIMPLY DO NOT COUNT.

THE TRADITIONALLY-ORIENTED AND HEAVY SAUSAGE CONSUMER PLACES A PARTICULAR EMPHASIS ON FLAVOUR BUT ALSO ON PRICE. T99

- MARKETING DIRECTION

CLEARLY, MARKETING EFFORTS MUST STRESS FLAVOUR BEFORE ALL ELSE. HOWEVER, GIVEN ITS HIGH CHILD COMPONENT, THE "MIDDLE CANADIAN": PRICE CONCERNED PSYCHOGRAPHIC GROUP MAY BE PARTICULARLY SUSCEPTIBLE TO SPECIFIC APPEALS ... BUT IN VIEW OF THEIR EVIDENT CONCERN WITH PRICE, THIS ELEMENT WOULD ALSO HAVE TO BE EMPHASISED.

BY CONTRAST, SPECIALTY SAUSAGE MARKETING SHOULD PROBABLY FOCUS ON THOSE SEGMENTS WHERE THEY ARE CURRENTLY MOST SUCCESSFUL: THOSE WITH A HIGHER INCOME AND BETTER EDUCATION.

T89

SAUSAGES AND WIENERS

	TOTAL	ONT-TARIO	QUE-BEC	PRAI-RIES	B.C.	ATLAN-TIC
SAUSAGES						
EVER SERVED	92	92	94	90	87	96
SERVED IN LAST 6 MONTHS	76	76	78	68	81	85
SERVED IN LAST 6 WEEKS	65	63	66	55	74	74
IN HOME	41	41	39	37	52	48
WIENERS						
EVER SERVED	90	92	94	82	84	94
SERVED IN LAST 6 MONTHS	75	80	79	55	70	91
SERVED IN LAST 6 WEEKS	64	67	67	47	58	(83)
IN HOME	47	54	45	30	34	(66)

○ = RELATIVELY HIGH

T90

FREQUENCY OF SERVING SAUSAGES AND WIENERS

	TOTAL (1001)		ONTARIO (400)	QUEBEC (251)	PRAIRIES (140)	B.C. (110)	ATLANTIC (100)	
	%		%	%	%	%	%	
AT LEAST 3-4 TIMES A WEEK	6	37	8	7	4	1	6	49
1-2 TIMES A WEEK	31		32	27	30	28	43	
ONCE EVERY 10 DAYS - TWO WEEKS	20		19	22	15	25	20	
ONCE EVERY 3/4 WEEKS	14		12	16	16	15	13	
ONCE EVERY 6/8 WEEKS	8		9	7	8	10	5	
LESS OFTEN	12		11	14	17	8	7	
NEVER	4		3	4	6	8	2	

FREQUENCY OF SERVING SAUSAGES AND WIENERS

	PRESENCE OF CHILDREN					
	CHILDREN UP TO 6	CHILDREN 7 - 12		TEENAGERS	NO CHILDREN	
AT LEAST 3-4 TIMES A WEEK	8	11	54	10	4	28
1-2 TIMES A WEEK	43	43		36	24	
ONCE EVERY 10 DAYS - 2 WEEKS	23	20		20	19	
ONCE EVERY 3/4 WEEKS	11	14		12	15	
ONCE EVERY 6/8 WEEKS	6	5		7	10	
LESS OFTEN THAN ONCE EVERY TWO MONTHS	4	3		9	16	
NEVER	2	2		1	6	

FREQUENCY OF BUYING SAUSAGES AND WIENERS

	TOTAL (1001)		ONTARIO (400)	QUEBEC (251)	PRAIRIES (140)	B.C. (110)	ATLANTIC (100)	
	%		%	%	%	%	%	
ONCE A WEEK OR MORE	22	47	22	26	17	13	33	62
ONCE EVERY 2 WEEKS	25		23	24	29	27	29	
ONCE A MONTH	23		26	22	21	24	20	
ONCE EVERY 6 WEEKS	4		6	3	4	5	3	
ONCE EVERY 2 MONTHS	5		5	5	5	7	5	
ONCE EVERY 3 MONTHS	5		4	6	5	5	3	
LESS OFTEN	10		11	10	10	7	5	
NEVER	4		3	4	6	8	2	

SAUSAGES & WIENERS

	TOTAL %	ONTARIO %	QUEBEC %	PRAIRIES %	B.C. %	ATLANTIC %
SERVED DURING JANUARY 19-25, 1987						
PURE PORK SAUSAGES	16	18	15	16	16	16
OTHER FRESH SAUSAGES	10	8	11	9	9	14
CURED SMOKED SAUSAGES	9	7	11	11	8	3
BEEF WIENERS	16	19	15	13	13	16
PORK WIENERS	14	14	10	19	14	20
IN HOME						
BEEF WIENERS	35	36	36	34	23	46
PORK WIENERS	9	9	10	6	6	11
ANY WIENERS, DON'T KNOW MEAT	13	15	8	16	13	20
BEEF SAUSAGES	22	14	25	24	29	31
PORK SAUSAGES, INCLUDING PATTIES AND SAUSAGE MEAT	22	28	14	25	25	16
SPECIALTY SAUSAGES	12	14	7	20	15	3
NONE	4	3	4	6	8	2

ALL HIGHLIGHTED PERCENTAGES ARE ABOVE AVERAGE.

TYPES OF SAUSAGES AND WIENERS BOUGHT MOST OFTEN

	TOTAL (1001) %	ONTARIO (400) %	QUEBEC (251) %	PRAIRIES (140) %	B.C. (110) %	ATLANTIC (100) %
BEEF WIENERS	27	28	26	26	17	㊶
PORK WIENERS	7	7	10	6	5	8
ANY WIENERS, DON'T KNOW MEAT	9	11	6	11	8	11
PURE BEEF SAUSAGES	21	12	26	25	26	24
PURE PORK SAUSAGES INCLUDING PATTIES & SAUSAGE MEAT	18	㉓	14	16	⑳	12
SPECIALITY SAUSAGES (E.G. BOCKWURST, ETC)	9	10	8	11	9	$\boxed{3}$
NONE	4	3	4	6	8	2

○ = RELATIVELY HIGH

□ = RELATIVELY LOW

SPECIALTY SAUSAGES

- NO APPARENT DIFFERENCES IN USAGE WITH RESPECT TO AGE OR PRESENCE OF CHILDREN BUT.....

		SPECIALTY SAUSAGES		
		EVER BUY	BUY MOST OFTEN	IN HOME
INCOME	UNDER $30,000	28%	8%	11%
	$30,000 - $49,000	37	10	15
	$50,000+	44	15	17
EDUCATION	HIGH SCHOOL OR LESS	28	7	9
	UNIVERSITY GRADUATE	40	13	17

- NO PSYCHOGRAPHIC DIFFERENCES ARE EVIDENT.

PSYCHOGRAPHIC CLUSTERS

	TRADITIONAL	DIET	PRICE	LOW INVOLVED	MODERN
SAUSAGE CONSUMPTION					
HEAVY	41%	34%	37%	33%	38%
MEDIUM	18	28	25	20	25
LIGHT	30	31	28	35	30
NON USER	12	7	10	11	7
PRESENCE OF CHILDREN					
NONE	65%	60%	44%	68%	62%
AT LEAST ONE	35	40	56	32	38

○ = RELATIVELY HIGH

RELATIVE IMPORTANCE OF SAUSAGE ATTRIBUTES

	TOTAL	ONTARIO	QUEBEC	PRAIRIES	B.C	ATLANTIC
GOOD FLAVOUR	5.6	5.6	5.8	5.3	5.7	5.4
REASONABLE PRICE	4.6	4.5	4.6	4.3	4.7	4.9
TYPE OF MEAT IT'S MADE OF	4.5	4.7	4.1	4.9	4.8	4.2
A BRAND I KNOW	3.9	4.0	4.1	3.6	3.3	3.8
NUTRITIONAL VALUE	3.4	3.2	3.6	3.6	3.1	3.5
CHILDREN LIKE IT	2.7	2.6	2.7	2.9	2.7	2.9
AMOUNT OF FAT IT CONTAINS	3.1	3.0	3.0	3.2	3.4	3.1

NOTE: MEAN SCORES:
MOST IMPORTANT = +7
SECOND MOST IMPORTANT = +6
THIRD MOST IMPORTANT = +5
FOURTH MOST IMPORTANT = +4
NOT CHOSEN IN TOP FOUR = +2

RELATIVE IMPORTANCE OF SAUSAGE ATTRIBUTES

	ANY CHILDREN	NO CHILDREN
GOOD FLAVOUR	5.5	5.7
REASONABLE PRICE	4.7	4.5
TYPE OF MEAT IT'S MADE OF	4.4	4.6
A BRAND I KNOW	3.7	4.0
NUTRITIONAL VALUE	3.3	3.5
CHILDREN LIKE IT	3.5	2.2
AMOUNT OF FAT IT CONTAINS	2.8	3.3

NOTE: MEAN SCORES:
MOST IMPORTANT = +7
SECOND MOST IMPORTANT = +6
THIRD MOST IMPORTANT = +5
FOURTH MOST IMPORTANT = +4
NOT CHOSEN IN TOP FOUR = +2

RELATIVE IMPORTANCE OF SAUSAGE ATTRIBUTES

	PSYCHOGRAPHIC CLUSTERS				
	TRADITIONAL	**DIET**	**PRICE**	**LOW INVOLVED**	**MODERN**
FLAVOUR	5.8	5.5	5.6	5.7	5.6
REASONABLE PRICE	4.8	4.2	4.9	4.5	4.5
TYPE OF MEAT	4.4	4.7	4.4	4.6	4.5
BRAND I KNOW	3.8	3.9	3.6	4.2	4.1
NUTRITIONAL VALUE	3.0	3.6	3.3	3.2	3.6
CHILDREN LIKE IT	2.8	2.6	3.0	2.5	2.5

NOTE: MEAN SCORES:
MOST IMPORTANT = +7
SECOND MOST IMPORTANT = +6
THIRD MOST IMPORTANT = +5
FOURTH MOST IMPORTANT = +4
NOT CHOSEN IN TOP FOUR = +2

Table Reference

9.3 BACON

- CONSUMPTION

BACON CONSUMPTION CUTS EQUALLY ACROSS ALL DEMOGRAPHIC GROUPS WITH THE EXCEPTION THAT:

- FAMILY SIZE AFFECTS BACON CONSUMPTION T100
- 35% OF SINGLE PERSON HOUSEHOLDS SERVED BACON IN THE WEEK OF JANUARY 19TH, 1987
- 56% OF 2 PERSON OR LARGER HOUSEHOLDS SERVED BACON

BACON CONSUMPTION ALSO DIFFERS LITTLE BY ANY PARTICULAR PSYCHOGRAPHIC GROUPING, WITH THE EXCEPTION THAT THE "MODERN" CANADIAN IS A PARTICULARLY HEAVY USER.

- FUTURE TRENDS

FOUR FIFTHS DO NOT EXPECT TO CHANGE THEIR BACON CONSUMPTION; OF THOSE WHO EXPECT TO CHANGE, MORE WILL DECREASE THAN INCREASE THEIR CONSUMPTION. T104

If one group expects to increase its consumption it is the under 35's, with or without children. Bases are VERY small, but perceptions of a more reasonable price seem to be a factor here.

- **Barriers**

Health concerns - fat and cholesterol particularly, but also salt and nitrates to a lesser extent - are the main barriers.

- **Marketing Direction**

Consumption is already high.

No particular group seems susceptible to special targeting. Attitudes towards processed products generally, and specifically to bacon, suggest playing up flavour and price.

BACON

- THREE OUT OF FIVE HOUSEHOLDS HAD BACON AT HOME IN FEBRUARY 1987 AND OVER FOUR OUT OF EVERY FIVE HOUSEHOLDS HAD SERVED IT IN THE LAST SIX MONTHS.

	TOTAL %	ONTARIO %	QUEBEC %	PRAIRIES %	B.C. %	ATLANTIC %
BACON SERVED						
DURING THE WEEK OF JANUARY 19-25, 1987	53	57	47	54	45	58
USUALLY SERVED AT LEAST ONCE A WEEK	41	40	41	41	44	55
IN HOME IN FEBRUARY, 1987	59	59	63	50	60	60
SERVED SINCE LAST SEPTEMBER	84	88	82	71	85	92
TYPES OF BACON SERVED DURING WEEK OF JAN 19-25'87						
SIDE	43	49	34	46	39	50
BACK	6	6	9	5	5	4
PEAMEAL	2	5	1	1	*	2

*LESS THAN 0.5%

T101

FREQUENCY OF SERVING SIDE/REGULAR BACON FOR BREAKFAST
(PROVINCE)

	TOTAL (1001)		ONTARIO (400)	QUEBEC (251)	PRAIRIES (140)	B.C. (110)	ATLANTIC (100)	
	%		%	%	%	%	%	
EVERY DAY OR ALMOST EVERY DAY	4		6	4	2	3	8	
3-4 TIMES A WEEK	6	41	6	4	7	7	13	55
1-2 TIMES A WEEK	31		28	33	32	34	34	
ONCE EVERY 10 DAYS - 2 WEEKS	12		15	12	8	14	10	
ONCE EVERY 3 WEEKS	4		5	4	2	3	3	
ONCE EVERY 4 WEEKS	6		6	7	8	6	3	
ONCE EVERY 6 WEEKS	2		2	*	3	4	1	
ONCE EVERY 2 MONTHS	4		4	5	3	8	2	
LESS OFTEN THAN ONCE EVERY 2 MONTHS	13		12	14	18	9	12	
NEVER	16		17	16	16	13	14	

*LESS THAN 0.5%

FREQUENCY OF BUYING SIDE BACON

	ONTARIO	QUEBEC	PRAIRIES	B.C.	ATLANTIC
ONCE A WEEK OR MORE	24%	29%	14%	15%	35%
ONCE EVERY 2 WEEKS	19	20	31	25	19
ONCE A MONTH	24	21	17	24	16
ONCE EVERY 6 WEEKS	4	2	4	5	3
ONCE EVERY 2 MONTHS	7	6	8	11	8
ONCE EVERY 3 MONTHS	4	6	5	4	9
LESS OFTEN	10	9	16	7	5
NEVER	8	7	6	9	5

T103

BACK BACON BOUGHT

	ONT-ARIO	QUE-BEC	PRAI-RIES	B.C.	ATLAN-TIC
AT LEAST ONCE EVERY 2 WEEKS	6%	5%	5%	4%	5%
ONCE A MONTH	8	2	10	11	6
ONCE EVERY 6 WEEKS	3	1	3	1	2
ONCE EVERY 2 MONTHS	5	2	9	4	4
ONCE EVERY 3 MONTHS	4	2	6	1	3
LESS OFTEN	22	9	18	15	15
NEVER	52	80	48	65	65

PEAMEAL BACON BOUGHT

	ONT-ARIO	QUE-BEC	PRAI-RIES	B.C.	ATLAN-TIC
AT LEAST ONCE EVERY 2 WEEKS	5%	*	-	-	-
ONCE A MONTH	10	*	-	-	1
ONCE EVERY 6 WEEKS	1	-	-	-	-
ONCE EVERY 2 MONTHS	8	-	-	-	-
ONCE EVERY 3 MONTHS	8	*	-	-	3
LESS OFTEN	23	2	14	6	6
NEVER	46	96	86	94	90

ANTICIPATED FUTURE BACON CONSUMPTION

		AGE		
	TOTAL	UP TO 34	35 - 54	55 & OVER
MORE	5%	9%	2%	3%
LESS	9	7	10	10
SAME	81	77	84	82

REASONS FOR EXPECTING TO SERVE LESS BACON

	TOTAL
	(93)
	%
HEALTH CONSIDERATIONS	65
TOO MUCH FAT	38
TOO MUCH CHOLESTEROL	13
TOO EXPENSIVE	30
FAMILY CONSIDERATIONS	14

Table Reference

9.4 CANNED MEAT, ANY TYPE

- JUST OVER HALF OF ALL CANADIANS HAVE SERVED CANNED MEAT AND A FIFTH HAD IT AT HOME IN FEBRUARY 1987. T105

- THERE IS SUBSTANTIAL REGIONAL DIVERSITY IN THE USAGE OF CANNED MEAT. T106

- ATLANTIC CANADA USES CANNED MEAT SUBSTANTIALLY MORE THAN ELSEWHERE AND THE PRAIRIE PROVINCES ARE ALSO HEAVIER USERS. QUEBEC USES IT LEAST OF ALL AND TWO THIRDS OF HOUSEHOLDS IN THAT PROVINCE DENY EVER USING.

- ONTARIO FALLS BETWEEN THESE EXTREMES; JUST OVER HALF HAVE EVER USED.

- A FIFTH OF HOUSEHOLDS CLAIM TO USE CANNED MEAT AT LEAST ONCE EVERY TWO WEEKS. OVER HALF OF ATLANTIC CANADA DOES SO, WHEREAS BARELY ONE IN TEN QUEBECKERS DO. IN ONTARIO THE PROPORTION IS 16%.

T105

FREQUENCY OF BUYING CANNED MEAT

	TOTAL	ONT-ARIO	QUE-BEC		PRAI-RIES	B.C.	ATLAN-TIC	
	%	%	%		%	%	%	
ONCE A WEEK OR MORE	7	5	4	8	9	5	22	45
ONCE EVERY 2 WEEKS	8	6	4		13	7	23	
ONCE A MONTH	11	10	4		16	14	20	
ONCE EVERY 6 WEEKS	2	1	1		4	2	1	
ONCE EVERY 2 MONTHS	4	4	3		3	5	12	
ONCE EVERY 3 MONTHS	6	7	3		8	7	3	
LESS OFTEN THAN ONCE EVERY 3 MONTHS	16	22	17		11	11	5	
NEVER	46	45	63		36	49	14	

T106

FREQUENCY OF SERVING CANNED MEAT

	TOTAL	ONTARIO	QUEBEC		PRAIRIES	B.C.	ATLANTIC	
	%	%	%		%	%	%	
EVERYDAY OR ALMOST EVERY DAY	1	1	-		2	2	3	
3-4 TIMES A WEEK	2	2	1		3	1	5	
1-2 TIMES A WEEK	9	8	4	5	11	9	26	34
ONCE EVERY 10 DAYS - 2 WEEKS	7	5	4		11	10	18	
ONCE EVERY 3 WEEKS	2	3	3		2	2	-	
ONCE EVERY 4 WEEKS	6	5	2		9	5	13	
ONCE EVERY 6 WEEKS	2	2	2		4	3	1	
ONCE EVERY 2 MONTHS	5	5	2		8	7	9	
LESS OFTEN THAN ONCE EVERY 2 MONTHS	17	23	17		13	10	9	
NEVER	46	45	63		36	49	14	

OCCASIONS CANNED MEAT SERVED

	TOTAL (1001)
	%
MAINLY OR ONLY FOR SELF OR FAMILY	38
MAINLY OR ONLY FOR ENTERTAINMENT	3
BOTH	10

○ = RELATIVELY HIGH

10. NEW PRODUCT DEVELOPMENT

Table Reference

10.1 FRESH

DEVELOPING NEW PRODUCTS IS AN ESSENTIAL ACTIVITY TO CREATING, AND RETAINING, INTEREST IN ANY MARKET. FOR FRESH PORK, SOME OF THE KEY POINTS RELATING TO NEW PRODUCT DEVELOPMENT ARE:

... BONESLESS PRODUCTS SEEM TO BE OF INCREASING INTEREST T107

... THE LEVEL OF EXPRESSED INTEREST IN NEW PORK PRODUCTS CONFIRMS THE RELATIVE APPEAL OF BONELESS CUTS T109

... BONELESS CUTS OFFER VALUE AND CONVENIENCE. THE CURRENTLY WEAK PERCEPTION THAT THEY HAVE LESS FAT COULD BE BOLSTERED AND EXPLOITED, TO THE GENERAL BENEFIT OF THE TOTAL IMAGE OF FRESH PORK

... OF THE NEW CUTS INVESTIGATED, THE "PLAIN" BONELESS CUTLETS AND STEAKS OBTAINED A CONSIDERABLY HIGHER EVALUATION THAN THE STUFFED PRODUCTS. 30% INDICATED STRONG

Table Reference

INTEREST IN SUCH CUTS, VERSUS 20% IN THE STUFFED PRODUCTS

... ALTHOUGH INTEREST IS HIGHER AMONG CURRENT HEAVY PORK USERS, THESE CUTS ALSO DO APPEAL TO LIGHTER USERS (I.E. HEAVIER USERS OF OTHER MEATS) T111

... THE PSYCHOGRAPHIC GROUPS MOST SUSCEPTIBLE TO THESE NEW CUTS SEEM TO BE THE "PRICE" AND THE "MODERN" ORIENTED CANADIANS T112

10.2 PROCESSED

... FLAVOUR IS THE BASIS OF APPEAL FOR ALL THESE PRODUCTS, AND IT IS LIKELY THAT THE MOST PRODUCTIVE NEW PRODUCT DEVELOPMENT WOULD FOCUS ON THIS ASPECT, RATHER THAN, FOR EXAMPLE, TAKING A NUTRITIONAL "LEAN CUISINE" ANGLE

... IN PROCESSED PRODUCTS, WHETHER SAUSAGES OR COLD CUTS, A MAJOR PROPORTION OF CONSUMPTION IS CHILD-DRIVEN AND EVERYDAY RATHER THAN SPECIAL OCCASION-ORIENTED. THIS, TOO, SHOULD BE BORNE IN MIND IN ANY DEVELOPMENT WORK

CONSUMPTION OF BONELESS CUTS OF MEAT

- 81% OF CANADIAN HOUSEHOLDS BUY BONELESS MEAT
- 20% OF THEM BELIEVE THEY ARE INCREASING THEIR BONELESS MEAT CONSUMPTION
- 7% OF THEM BELIEVE THEY ARE DECREASING THEIR BONELESS MEAT CONSUMPTION
- 53% OF CANADIAN HOUSEHOLDS ARE SEEING NO CHANGE IN THEIR USE OF BONELESS MEAT

WHY DO PEOPLE BUY BONELESS MEAT?

BETTER VALUE	**70%**
LESS WASTE	34
GOOD VALUE FOR MONEY	28
LESS FAT	12
EASIER PREPARATION AND SERVING	**46%**
EASIER TO CUT	18
EASIER TO PREPARE	17
LESS TIME TO PREPARE	7
MORE CONVENIENT TO USE IN VARIOUS RECIPES	6
BETTER QUALITY	9

- THE "PRICE" AND "MODERN" PSYCHOGRAPHIC CLUSTERS PARTICULARLY EMPHASISE THE CONVENIENCE OF BONELESS CUTS.

BONELESS CUTS

		BUY BONELESS AT ALL	USE OF BONELESS CUTS IS INCREASING
TOTAL		81%	20%
REGION	ONTARIO	78	21
	QUEBEC	79	16
	PRAIRIES	89	30
	B.C.	85	23
	ATLANTIC	71	9
AGE	UNDER 35	83	23
	35 - 54	80	21
	55 & OVER	78	17
HOUSEHOLD SIZE	1	70	15
	2	82	21
	3 & MORE	84	22
INCOME	UNDER $30,000	78	19
	$30,000-49,999	81	24
	$50,000 & OVER	91	25
PSYCHOGRAPHIC CLUSTERS	TRADITIONAL	75	12
	DIET	84	22
	PRICE	81	21
	LOW INVOLVED	77	16
	MODERN	83	28

○ = RELATIVELY HIGH

□ = RELATIVELY LOW

T109

VERY INTERESTED IN......

		STEAK	CUTLETS	STUFFED CHOPS	STUFFED ROAST
TOTAL		29%	31%	19%	19%
REGION					
	ONTARIO	31	34	19	19
	QUEBEC	31	32	26	24
	PRAIRIES	21	27	11	14
	BRITISH COLUMBIA	34	28	8	11
	ATLANTIC	26	24	26	24
AGE					
	UNDER 35	31	32	18	17
	35 - 54	29	33	23	23
	55 & OVER	27	26	15	16
HOUSEHOLD SIZE					
	1	20	24	17	11
	2	29	32	16	17
	3 & OVER	32	32	21	22
INCOME					
	UNDER $30,000	27	29	19	16
	$30,000 - $49,999	34	35	17	21
	$50,000 & OVER	35	34	26	31
CHILDREN					
	NONE	27	27	17	15
	ANY	33	35	21	23

○ = RELATIVELY HIGH

PURCHASE INTEREST IN NEW CUTS OF PORK

	TOTAL	ONTARIO	QUEBEC	PRAIRIES	B.C.	ATLANTIC
PORK CUTLETS	3.6	3.7	3.5	3.7	3.7	3.3
PORK STEAK	3.5	3.6	3.4	3.5	3.8	3.4
FRESH READY STUFFED PORK ROAST	2.8	2.6	3.0	2.7	2.7	2.9
FRESH READY STUFFED PORK CHOPS	2.7	2.6	3.0	2.7	2.5	2.9

MEAN SCORES: VERY INTERESTED = +5, NOT AT ALL INTERESTED = +1.

T111

PURCHASE INTEREST IN NEW CUTS OF PORK

	PORK USERS			
	HEAVY	MEDIUM	LIGHT	NON-USERS
PORK CUTLETS	3.9	3.8	3.6	2.8
PORK STEAK	3.8	3.7	3.5	2.4
FRESH READY STUFFED PORK CHOPS	2.9	2.9	2.7	2.0
FRESH READY STUFFED PORK ROAST	2.9	2.9	2.7	2.1

	BEEF USERS		
	HEAVY	MEDIUM	LIGHT
PORK CUTLETS	3.6	3.7	3.6
PORK STEAK	3.5	3.6	3.4
FRESH READY STUFFED PORK CHOPS	2.7	2.8	2.8
FRESH READY STUFFED PORK ROAST	2.7	2.8	2.8

MEAN SCORES: VERY INTERESTED = +5, NOT AT ALL INTERESTED = +1.

PURCHASE INTEREST IN NEW CUTS OF PORK

	PSYCHOGRAPHIC CLUSTERS				
	TRADITIONAL	DIET	PRICE	LOW INVOLVED	MODERN
PORK CUTLETS	3.4	3.4	3.8	3.6	3.9
PORK STEAK	3.4	3.4	3.6	3.5	3.7
FRESH READY STUFFED PORK ROAST	2.5	2.5	3.0	2.8	3.0
FRESH READY STUFFED PORK CHOPS	2.4	2.6	2.8	2.7	3.1

MEAN SCORES: VERY INTERESTED = +5 NOT AT ALL INTERESTED = +1.

APPENDIX A

TECHNICAL APPENDIX

A. TECHNICAL APPENDIX

PART I - MEAT USAGE DIARY

1. THE SAMPLE

THE SAMPLE WAS DRAWN FROM THE 3,300 HOUSEHOLDS (EQUATING TO 10,000 INDIVIDUALS) WHICH MAKE UP ISL'S CONSUMER PANEL OF CANADA.

2. THE CONSUMER PANEL OF CANADA

THE CONSUMER PANEL OF CANADA HAS BEEN AN ISL SERVICE SINCE 1946. THE PANEL CONSISTS OF A PRECISION SAMPLE OF 3,300 HOUSEHOLDS REPRESENTATIVE OF 98% OF THE HOUSEHOLD POPULATION OF CANADA (EXCLUDING NEWFOUNDLAND AND THE TWO NORTHERN TERRITORIES - THE REMAINING 2% OF HOUSEHOLDS).

EACH MONTH, USING A SPECIALLY PREPARED DIARY, PANEL MEMBERS REPORT PURCHASES IN OVER 70 GROCERY AND PERSONAL CARE CATEGORIES. PURCHASE DETAILS - WHICH INCLUDE ITEM BOUGHT, NUMBER BOUGHT, PRICE PAID, SOURCE OF PURCHASE, VARIETY, SIZE, UPC CODE, ETC. - ARE ENTERED IN THE DIARY IMMEDIATELY FOLLOWING PURCHASE. AT THE END OF EACH MONTH, THE DIARIES ARE RETURNED TO

ISL for editing and processing.

Basic control of the Panel is demographic - using a multi-dimensional cell approach created by a cross-analysis between six major characteristics within each region of Canada. For example, within each region of Canada, the sample is controlled by:

	4 City Size Clusters
each of which is broken into	4 Age of (Female) Head of Household Clusters
each of which is broken into	4 Presence of Children Clusters
each of which is broken into	3 Mother Tongue Clusters
each of which is broken into	4 Household Size Clusters
each of which is broken into	5 Household Income Clusters

DATA FOR CONTROL OF THE PANEL IS SUPPLIED BY STATISTICS CANADA.

WITHIN THE NATIONAL SCOPE OF THE PANEL, THE SAMPLE IN EACH REGION IS DISPROPORTIONATE TO ITS REPRESENTATION OF THE CANADIAN HOUSEHOLD POPULATION. THIS ALLOWS THE PANEL SAMPLE TO MAINTAIN A SATISFACTORY NUMBER OF HOUSEHOLDS FOR ALL REGIONS. THE DATA COLLECTED EACH MONTH IS COMPUTER WEIGHTED TO PROVIDE NATIONAL REPRESENTATION. THE HOUSEHOLD SAMPLE SIZE OF THE PANEL IS:

MARITIMES	450
QUEBEC (EXCLUDING HULL)	650
ONTARIO (INCLUDING HULL)	775
MANITOBA	250
SASKATCHEWAN	250
ALBERTA	375
BRITISH COLUMBIA	550
	3,300

ANALYSIS OF THE PANEL IS POSSIBLE ON A NATIONAL, REGIONAL, PROVINCIAL AND MAJOR CITY BASIS.

THE CONSUMER PANEL OF CANADA CONSISTS OF A CONTINUOUSLY REPORTING SAMPLE OF CANADIAN HOUSEHOLDS. IT IS, AS SUCH, A STATIC SAMPLE, WITH THE SAME HOUSEHOLDS REPORTING EACH MONTH. OF UTMOST IMPORTANCE IN SUPPORTING A CONTINUOUS SAMPLE IS THE WORKING RELATIONSHIP BETWEEN PANEL MEMBERS AND PANEL ADMINISTRATORS. OBJECTIVE, ACCURATE AND THOROUGH REPORTING IS MAINTAINED THROUGH:

- PAYMENT FOR CO-OPERATION
- A THREE MONTH TRAINING PERIOD
- A FULL-TIME "PANEL RELATIONS" SPECIALIST
- COLLECT CALL DIARY ASSISTANCE
- A MONTHLY NEWSLETTER.

PANEL MEMBERS ARE REMUNERATED MONTHLY BY MEANS OF A POINT SYSTEM. FOR EACH COMPLETE DIARY, A PANEL MEMBER RECEIVES POINTS WHICH CAN BE REDEEMED AT ANY TIME FOR MERCHANDISE FROM A CATALOGUE. AS AN ADDITIONAL INCENTIVE, EACH YEAR PANEL MEMBERS PARTICIPATE IN FOUR QUARTERLY DRAWS AND ONE GRAND NATIONAL DRAW WHICH AWARDS THE WINNERS WITH SUBSTANTIAL BONUS POINTS.

3. SURVEY METHODOLOGY

FOR THIS STUDY, ALL HOUSEHOLDS (3,300) WERE SENT A SPECIAL MEAT USAGE DIARY. THIS DIARY REQUIRED THE PERSON IN THE HOUSEHOLD WHO COMPLETES THE REGULAR CPC MONTHLY DIARY TO FILL IN ALSO DETAILS OF ALL MEALS FOR ALL HOUSEHOLD MEMBERS FOR A FULL WEEK. DIARIES WERE RETURNED TO ISL.

THUS, THE MEAL DIARY CAPTURED FOR APPROXIMATELY 10,000 INDIVIDUALS, FOR 28 MEAL OCCASIONS (BREAKFAST/LUNCH/DINNER/SNACKS FOR 7 DAYS), THE FOLLOWING:

- FULL DEMOGRAHPICS
- DETAILS OF FOODS WHICH COULD NOT BE EATEN FOR RELIGIOUS/HEALTH/DIETARY/PHILOSOPHICAL (E.G. VEGETARIANISM) REASONS
- MEAT/POULTRY/FISH BY TYPE EATEN AT EACH MEAL
- PREPARATION OF FORM OF MEAT/POULTRY/FISH

4. FIELDWORK

THE TIMING OF THE FIELDWORK FOR THIS STUDY WAS:

MAIL OUT:	JANUARY 5 - 9, 1987
RETURNS:	JANUARY 27 - FEBRUARY 12, 1987.

5. COMPUTING

THE CODING AND COMPUTING FOR THE MEAT USAGE DIARY WAS COMPLETED AT THE ISL COMPUTER CENTRE IN TORONTO.

6. WEIGHTING

THE DATA WAS WEIGHTED TO BE REPRESENTATIVE NATIONALLY BASED ON THE LATEST DATA SUPPLIED BY STATISTICS CANADA.

PART II - USAGE AND ATTITUDE SURVEY

1. THE SAMPLE

THE SURVEY INVOLVED A NATIONAL REPRESENTATIVE SAMPLE OF 1001 HOUSEHOLDS IN COMMUNITIES OF 30,000 INHABITANTS OR MORE.

SAMPLE SELECTION WITHIN PROVINCE WAS PROPORTIONATE TO COMMUNITY SIZE, BUT WAS REGIONALLY DISPROPORTIONATE IN ORDER TO PROVIDE A LARGE BASE IN ONTARIO AND AN ADEQUATE BASE IN THE OTHER REGIONS. ACTUAL SAMPLE SIZES WERE:

ATLANTIC	100
QUEBEC	251
ONTARIO	400
PRAIRIES	140
BRITISH COLUMBIA	110

2. SURVEY METHODOLGY

SAMPLE SELECTION WAS BASED ON A FRAME OF ALL RELEVANT ENUMERATION AREAS, LISTED IN ASCENDING ORDER OF COMMUNITY SIZE, AND A TOTAL OF 10 INTERVIEWS WERE CONDUCTED PER SELECTED ENUMERATION AREA (E.A.).

HOUSEHOLD SELECTION WITHIN EACH E.A. INVOLVED A RANDOM START POINT AND SYSTEMATIC WALK PATTERN. AN ATTEMPT AT CONTACT WAS MADE AT EVERY 6TH HOUSE AND UP TO 3 RECALLS WERE CONDUCTED TO SECURE A COMPLETED INTERVIEW.

THE DESIGNATED RESPONDENT WAS THE MALE OR FEMALE HEAD AGED 18 OR OVER WHO WAS RESPONSIBLE FOR AT LEAST 50% OF GROCERY SHOPPING AND FOOD CHOICES.

ALL HOUSEHOLDS WERE ELIGIBLE, WITH THE FOLLOWING EXCEPTIONS:

- NO MEAT AT ALL CONSUMED FOR RELIGIOUS OR DIETARY REASONS
- NO PORK CONSUMED FOR RELIGIOUS OR DIETARY REASONS
- ASSOCIATION WITH ANY OF THE FOLLOWING OCCUPATIONS - RADIO, ADVERTISING, PUBLIC RELATIONS, MARKET RESEARCH, MAGAZINES, NEWSPAPERS, A MEAT MANUFACTURER OR MEAT SECTION OF A GROCERY STORE

3. CONTROLS

DUE TO CONCERNS THAT SPECIFIC DEMOGRAPHIC CHARACTERISTICS COULD BE PARTICULARLY RELEVANT TO THIS STUDY, BROAD QUOTAS WERE IMPOSED TO ENSURE THAT THE FINAL SAMPLE INVOLVED APPROPRIATE REPRESENTATION BY:

- SEX
- HOUSEHOLD SIZE
- DWELLING TYPE
- AGE
- LANGUAGE (QUEBEC)

AGE AND SEX QUOTAS

	AGE OF FEMALE HEAD			
	UP TO 34 YEARS	35 - 44 YEARS	45 - 64 YEARS	65 + YEARS
ATLANTIC	36%	17	32	15
QUEBEC	38%	18	32	12
ONTARIO	36%	18	32	14
WEST	40%	17	29	14

HOUSEHOLD SIZE QUOTAS

	HOUSEHOLD SIZE			
	1 PERSON	2 PERSON	3 PERSON	4+ PERSON
ATLANTIC	17%	27	38	18
QUEBEC	20%	28	38	14
ONTARIO	21%	29	36	14
WEST	22%	31	34	13

% OF APARTMENTS

	CITY SIZE	% OF APARTMENTS
ATLANTIC	30,000 - 99,999	17%
	100,000 +	31%
QUEBEC	30,000 - 249,999	24
	500,000 - 999,999	39
	1,000,000 +	49
ONTARIO	30,000 - 249,999	20
	250,000 - 499,000	25
	500,000 - 999,999	31
	1,000,000 +	39
WEST	30,000 - 249,999	24
	500,000 - 999,999	28
	1,000,000 +	33

EACH RESPONDENT WAS ASKED THEIR MEAT CONSUMPTION OVER THE TWO DAYS PRIOR TO THE INTERVIEW. DAY OF THE WEEK INTERVIEWING CONTROLS WERE INSTITUTED SUCH THAT ONE SEVENTH

OF THE TOTAL INTERVIEWS WAS CONDUCTED ON EACH DAY OF THE WEEK, TUESDAY THROUGH SATURDAY, WITH TWO SEVENTHS BEING CONDUCTED ON MONDAY, HALF WITH REFERENCE DAYS OF FRIDAY AND SATURDAY (TO SUBSTITUTE FOR SUNDAY), HALF WITH REFERENCE DAYS SATURDAY AND SUNDAY.

4. FIELDWORK

INTERVIEWING WAS CONDUCTED BY THE FIELD DEPARTMENT OF ISL INTERNATIONAL SURVEYS LTD. OUT OF HEAD OFFICES IN TORONTO AND MONTREAL AND TOOK PLACE BETWEEN FEBRUARY 10 AND MARCH 10, 1987. THE CONTACT RECORD FOLLOWS:

	ONTARIO	QUEBEC	WEST	ATLANTIC	TOTAL
LANGUAGE PROBLEM	208	204	36	14	462
NO GROCERY SHOPPER	65	4	50	4	123
NO ANSWER/ RESPONDENT NOT AVAILABLE	307	41	95	48	491
REFUSED IMMEDIATELY	570	279	358	61	1,268
TERM. Q.A - NOT RESPONSIBLE FOR AT LEAST 50% OF GROCERY SHOPPING	99	32	11	-	142
TERM. Q.B - NOT RESPONSIBLE FOR AT LEAST 50% OF FOOD CHOICES	16	7	7	1	31

INELIGIBLE OCCUPATION	37	11	17	4	69
INELIGIBLE AGE	22	14	5	2	43
NO PORK CONSUMED	27	20	23	2	72
NO MEAT CONSUMED	10	4	9	6	29
QUOTA FILLED - SEX	49	38	78	22	187
QUOTA FILLED - AGE	198	239	140	55	632
QUOTA FILLED - HOUSEHOLD SIZE	95	183	36	8	322
QUOTA FILLED - DWELLING	21	26	4	3	54
QUOTA FILLED - LANGUAGE	-	3	-	-	3
REFUSED PARTWAY	20	5	30	2	57
COMPLETES	400	251	250	100	1,001

5. THE QUESTIONNAIRE

THE QUESTIONNAIRE, A COPY OF WHICH IS APPENDED, WAS DEVELOPED FOLLOWING A SERIES OF GROUP DISCUSSIONS IN LATE 1986 AND WAS PRETESTED TWICE BEFORE THE FINAL STUDY TOOK PLACE.

IN ORDER TO RESPECT INTERVIEWING TIME CONSTRAINTS A SERIES OF QUESTIONS WAS SPLIT-RUN BETWEEN MATCHED SUB-SAMPLES OF THE TOTAL.

Specifically:

Q's 7, 8 & 9 were each asked only of one third of the sample

Q.10b was asked about pork of everyone; fish, ham, beef and chicken of half the sample

Q.11b was asked of everyone for pork and chicken; of half the sample for beef and fish

Q.14 was asked about pork of all the sample; about beef and chicken of half the sample

Q.24 was presented in two different versions to half the sample each.

In addition, rotations within questions were predetermined on Q's 10b, 11b, 12 and 14.

6. Computing

All coding, editing and computing was completed at ISL's Head Office in Toronto.

7. Weighting

At the data analysis stage, the national data were weighted to adjust for the regional disproportions in the sampling and to reflect the actual regional proportions, as follows:

● Atlantic	8%
● Quebec	27
● Ontario	36
● Prairies	17
● British Columbia	12

8. Quality Control

20% of all interviews were validated by telephone, 10% by the local area supervisor, 10% by long distance calling from ISL's Toronto and Montreal offices. As is standard ISL practice, all interviewers and Supervisors were personally briefed before starting work.

PART III: MULTIVARIATE ANALYSIS

Two phases of multivariate analysis of the usage and attitude survey data were effected, factor analysis and cluster analysis.

- Factor Analysis:

  A factor run was executed for Q.12 psychographic product-related items.

The factoring procedure used was a principle components extraction that then had a varimax rotation applied to "heighten" attribute-factor relationship (reflected in, for instance, higher item factor loadings for items with single-factor relationships).

The factor summaries are attached at the end of this section.

Examination of the factor structures provided an understanding of how many dimensions consumers use in describing their own food-buying and preparation habits and attitudes.

The Q.12 item-factor loadings were used as a guide for the selection of individual items as clusters input. Care in selection of input items was exercised such that:

1) Bad items (eg. exhibiting extreme kurtosis or skewness) were not included

2) No one dimension was over-represented in the cluster input set

- Cluster Analysis:

  A number of items from the Q.12 battery chosen (refer to the 5 segment solution at the end of this section) for input to a clustering algorithm. (A Howard-Harris hierarchical algorithm was used. This is considered a "hybrid", in that after-the-fact re-assignment of respondents is permitted following each divisive step. This is done by comparing purely hierarchical centroids to each respondent using a Euclidian distance metric).

  Cluster solutions were run ranging from a 2-group solution to an 8-group solution.

The five-group solution was selected on the basis of:

1) A very clear change in both the average variable variance per group and Lambda going from the 4- to the 5-group solution.

2) Examination of the 6- versus the 5-group solution demographic, product usage, and attitude profiles indicated the sixth group contributed virtually no unique information.

Finally, a series of perceptual maps were executed on the:

1) Total sample meats (Q.13a-b)

2) One of each of five market segments again using the Q.13a-b meat

The standard MDS (Modified Bell-Laboratories) routine was used and the plots reflect the two-dimensional plane of the first two dimensions extracted is assumed as a vertical line from the origin.

Q.12 FACTOR ANALYSIS SUMMARY

Factor 1:

.77	13	I'm always interested in new recipes
.77	48	I make a point of trying out new recipes quite often
.69	40	I like to be adventurous in my cooking
.62	8	I often use recipes from magazines or newspapers
.62	46	I like trying recipes from different cultures
.54	30	I am usually among the first to try new products
.51	28	Recipe ideas right in store always catch my eye
.48	36	I really like to cook
-.40	1	I'm trying new things less than I used to

Factor 2:

.73	3	I try to limit our cholesterol consumption
.68	17	I usually try to look for foods with low fat
.65	32	I always look for food products with less salt or sodium
.61	7	These days I'm looking for lighter meats than I used to
.59	12	I use a lot of low calorie reduced products
.42	14	I'm very cautious about serving foods with artificial ingredients

Factor 3:

.76	43	I always check the specials before buying any meat
.75	16	I always look out for specials when I shop
.71	35	I pay a lot more attention to food prices now than I ever did before
.53	19	Because of high price, we've changed the way we eat at home

Factor 4:		
.80	11	My time is short and I have to serve meals that are easy
.80	26	These days, I have less time for food preparation
Factor 5:		
.71	23	A well-known brand is a guarantee of quality
.57	25	I tend to buy the same products/brands as my mother used to buy
.45	20	When I have a favourite brand I buy it - no matter what else is on sale
Factor 6:		
.65	15	I would like to have more variety in my cooking
.63	37	I would use more pork if I had more recipes to prepare it in different ways
.55	2	I would use more fish if I had more recipes to prepare it in different ways
.41	10	I seem to be replacing convenience foods with scratch cooking
Factor 7:		
(.56)	14	I'm very cautious about serving foods with artificial ingredients
.54	33	I'm concerned about the modern feeding methods used for animals
.50	42	I feel guilty when I serve convenience foods to my family
.48	45	I like to buy at least some of my meat from a real butcher
.44	6	I try to eat natural foods most of the time

Factor 8:

.58	9	There's too much talk these days about what's good and what's bad for you
.45	44	I prefer to stick to the cuts of meat and the recipes that I know
.45	39	I find cuts of meat that have leftovers very useful
.43	29	My family still prefers a meal of "meat and potatoes"

Factor 9:

.65	34	I like to know exactly what meat I'm going to buy before I go shopping
.64	18	I usually decide on my menus at least a few days in advance
-.46	4	If something on the meat counter looks good, I may buy it

Factor 10:

.74	47	I am buying and using more fresh foods now than I did in the past few years
.66	24	I eat more fresh fruit and vegetables today than before

Factor 11:

.67	41	I now eat out more often than I have in the past
.42	27	I now buy more frozen foods than I have in the past
.42	31	I presently own or will eventually own a microwave

Factor 12:

.50	38	When making the decision as to what food products to buy, the children's tastes should come first
.48	22	I eat smaller meals nowadays instead of three big meals

Non-Loading Items:

.12	5	The quality of a product is far more important than the price
-.29	21	I'm reluctant to try new recipes unless I'm sure the family will like them

TABLE OF MEANS RANKED BY F-STATEMENTS FOR 5 SEGMENT SOLUTION

		SEGMENTS					
	TOTAL	I	II	III	IV	V	
SAMPLE SIZE	1001	149	245	257	149	201	F-Value
Q12126 I have less time for food preparation	3.05	1.89	1.87	3.83	3.54	3.97	211.48
Q12111 My time is short I must serve meals that are easy	3.08	2.05	1.88	3.94	3.51	3.90	193.96
Q12113 I'm always interested in new recipes	3.71	2.64	4.19	3.90	2.79	4.37	97.59
Q1217 I'm looking for more lighter meals	3.58	2.48	4.15	3.48	3.10	4.19	82.44
Q121141 I now eat out more often	2.75	1.97	2.20	2.53	3.72	3.58	74.23
Q1213 I try to limit our cholesterol consumption	3.78	2.92	4.40	3.67	3.09	4.33	71.23
Q12120 When I have a favourite brand I always buy it	3.50	3.20	3.75	2.64	3.89	4.21	57.06
Q12114 I'm very cautions about artificial ingredients	3.63	3.02	4.13	3.56	2.80	4.17	56.54
Q12140 I like to be adventurous in my cooking	3.55	2.72	3.87	3.76	2.83	4.01	54.22
Q12124 I eat more fresh fruit and vegetables	4.02	3.23	4.45	3.90	3.52	4.57	51.36
Q12130 I am usually among the first to try new products	2.74	1.88	2.78	2.83	2.40	3.49	47.52

	TOTAL	I	II	III	IV	V	
SAMPLE SIZE	1001	149	245	257	149	201	F-Value
Q12130 I always look out for specials when I shop	4.29	4.39	4.31	4.56	3.36	4.52	46.96
Q12135 I pay a lot more attention to food prices	4.13	4.13	4.07	4.42	3.21	4.53	42.94
Q12137 I would use more pork if I had more recipes	2.73	2.15	2.37	2.84	2.65	3.54	39.81
Q12118 I decided on my menus a few days in advance	3.09	2.38	3.44	2.86	2.66	3.81	39.42
Q12127 I now buy more frozen foods	2.66	2.17	2.00	2.85	3.07	3.27	38.96
Q12123 A well-known brand is a guarantee of quality	3.10	3.13	3.37	2.35	3.11	3.72	36.31
Q1215 The quality of product is more important than price	3.97	3.56	4.38	3.49	3.97	4.39	37.83
Q12147 I am buying and using more fresh food	3.79	3.02	4.15	3.69	3.45	4.28	36.20
Q12115 I would like more variety in my cooking	3.75	3.15	3.64	4.02	3.34	4.26	36.16
Q12134 Know exactly what meat to buy before going shopping	3.68	3.40	3.91	3.55	2.97	4.30	34.17
Q12142 I feel guilty when I serve convenience food	2.90	2.46	3.12	2.92	2.18	3.49	31.89
Q12129 My family prefers a meal of meat and potatoes	3.71	4.35	3.64	3.38	3.13	4.19	29.72
Q12144 I stick to cuts of meat and recipes I know	3.90	4.11	3.96	3.48	3.87	4.25	16.72

APPENDIX B

PORK GROUP DISCUSSIONS: HIGHLIGHTS AND HYPOTHESES

PORK GROUP DISCUSSIONS

HIGHLIGHTS AND HYPOTHESES

INTRODUCTION

A total of 8 groups was conducted

- 4 in Toronto
- 2 in Vancouver
- 2 in (Francophone) Montreal

All respondents were female grocery shoppers, working and non-working, and spanned the full age range of adult females up to 59.

Half of the groups were composed of 'light' or non-pork users (but excluding any with a dietary, religious or other prohibition against pork consumption) and half of heavier pork users.

The definitions of light and heavy were, of necessity, determined a-priori; the actual composition of the groups in this respect is appended.

These discussions were conducted to provide input into design of the quantitative questionnaire.

The following is a brief summary of the main findings that emerged and some preliminary hypotheses that have been developed from them. Copies of the tapes are available on request.

PORK ASSOCIATIONS

The immediate association of pork is with the untreated meat. When probed most people do tend to associate pork with ham and bacon, in that they know they come from the same animal, however, from a usage perspective these three meats are perceived as discrete categories with their own characteristics. From an operational point of view, they should each be treated separately. For purposes of volume classification in the quantitative study, it is recommended that each of the three products be treated as separate entities, as well as in combination.

GENERAL USAGE

Pork: Apart from the occasional idiosyncratic objection to pork ("my husband just doesn't like it") or psychological barrier stemming from a strict Jewish upbringing, few families are non-users, rather there appears to be a spectrum of usage from light to heavy.

Ham: Overall usage is much lower than that associated with pork, but there appears to be no strong relationship between usage of these two meats.

Bacon: Usage seems to have no relationship at all to pork and ham usage.

TYPES & CUTS OF MEAT

Many female grocery shoppers demonstrate a high awareness of the main cuts of meat available. Clearly, awareness comes mainly from experience and a principal factor related to this experience is the degree of interest in and the resourcefulness brought to the cooking task.

Specifically, there is possibly a little more familiarity with the detail of beef cuts versus pork, however, usage of terminology in the questionnaire involving all the main cuts should not pose any problems.

SHOPPING PATTERNS & DECISION MAKING

It would seem that the most important element affecting basic meat purchases are prices and the promotion of these prices. This is as true of francophones as anglophones, although it is possible that this heightened awareness of "specials" is predominantly an urban phenomenon.

Shopping patterns for meat vary from virtually every day to once a month. However, the most common appears to be once a week. Most, but not all, do seem to have a fairly regular pattern and those living alone seem most likely to be the least regimented.

Sales or Specials are very important in affecting what people will buy, how much they will buy and even the frequency with which they buy - those who shop less frequently may go back specially if an attractive sale on meat is being offered.

> "I usually shop once a week, but if there's any specials, I hop over to Dominion"

Use of the Wednesday paper and of store flyers in determining what will be bought is common.

Some, likely fairly small minority, make up menus ahead of time and shop on that basis. Others, likely fairly large group, have some ideas as to what they will be buying; others, again, wait until they see what "tempts" them.

Other factors affecting decision making, either ahead of time or on the spot are:

- in store stimuli - promotions of any type, unadvertised specials, appearance of meat
- family preferences - and it was acknowledged that purchases may actually be different if children are along
- special meal occasions
- need of variety

The search for variety in meals is a big factor for many women and one that never seems to come to an end. Many claim to be constantly on the look out for new recipes and many of their comments lend credibility to this claim.

Recipes come principally from magazines and newspapers, but also friends and resturants.

Meat appearance/packaging is acknowledged to be "important" and the elements underlying a judgement of whether meat looks acceptable or not seem to be the fairly obvious ones of:

- degree of fat/bone visible
- colour

There is a level of scepticism respecting both these elements in connection with supermarket packaging - the fact that meat hidden on the bottom of packages is frequently not as good as that which is visible and the artificial colouring supplied by supermarket lights.

However, there is no evidence of any real antagonism and general acceptance by most of the fact that meat has to be purchased from supermarkets.

TYPE OF SHOPPER/COOK

Some of the variables identified as affecting shopping patterns are the following:

- family size
- income
- dietary needs
- microwave ownership
- upbringing
- ethnic/goegraphic origin
- working/non-working

TYPE OF SHOPPER (Cont'd)

- personality type - methodical, organised
  - adventurous
  - conservative
  - desire to impress
- social status upper class
  - yuppy
  - trendy
  - aspiring yuppy/trendy

PERCEPTION OF PORK

Most women, light and heavy users alike, view pork in a generally positive light.

Although views were by no means unanimous, pork tends to be viewed as a heavier meat, aligned on this dimension with beef and contrasted with the lighter fish and chicken.

Also in terms of menu/occasion appropriateness, it is generally seen as substitutable with beef ("whatever you can do with beef you can do with pork"). However, there were also suggestions that it was not as socially safe as chicken or beef.

Pork is also rated highly for menu flexibility in that most women felt there were many different ways of serving it, however not everyone considered it as flexible as chicken or beef, both of which also rate highly on this dimension.

For some pork is as tasty as beef, for others it is less so while yet others rate its taste even more highly. When compared with beef, pork is also probably the moister and more tender of the two.

Similarly with respect to ease of preparation, there are differences of opinion, with some feeling pork is easier to prepare than beef and others taking the reverse view.

One important issue for some with respect to cooking pork is trichinosis (although not all could give the name: "those worms"). This leads to concerns that pork must "really be cooked". Although this is probably not a majority problem, the subject seems almost certain to be raised in any group of 10 people, anglophone or francophone. On a consequence, it does seem that an undercurrent of anxiety with respect to pork, fed by this and by associated concerns/myths ("don't eat pork in summer"), may be inhibiting some pork consumption. Concerns about its relatively poor ability to 'keep' versus beef may also be part of this attitudinal complex.

Pork is also probably viewed as the least healthful and nutritious of all meats and fish. It has more fat and cholesterol even than beef and is at the other end of the spectrum from chicken and fish in this regard.

Although there was some evidence of ambivalence here - for example, in suggestions that pork fat can be cut-off, whereas beef fat is contained in the marbled meat - a majority clearly viewed pork as the fattier and least "good for you" of any meat.

Pork and beef are also less easily digestible than fish or poultry.

PERCEPTION OF HAM

As noted earlier, from any practical point of view this is viewed as a different meat from pork. This is evidenced in the views that a meal of pork or beef two days in a row (prepared in a similar fashion) would be repetitive (and is thus to be avoided) but a meal of ham following a meal of pork would not constitute repetition.

In some ways and for some people ham has some of the same characteristics as pork, but on balance it does tend to be seen as lighter and, in a general sense, closer to fish and poultry.

All meats may be "special occasion" or "ordinary", depending on the cut, but a piece of ham does, for many people, seem to occupy a really "special occasion" niche.

GROUND MEAT

Most people were aware of the 3 grades of fat in ground beef. However, there was disagreement as to whether such grading was available for ground pork and veal.

Limited usage of ground pork and veal was evident among anglophones in recipes such as meat loaf. In general people seemed quite interested in these other ground meats and menu based promotions could probably exploit the on-going search for variety. Although perceptions of excessive fatiness did not generally arise as an issue here, it should not be entirely disregarded.

This is one area where francophone behaviour is clearly different. They are familiar with all three ground meats and do use them, often in combination - (Spaghetti sauce, stuffed peppers, tourtières, roulés au chou, cretons,). Beef is probably the only one used on its own.

NEW CUTS OF PORK

These ideas generally excited interest, but would probably need to be supported by recipes.

SAUSAGES

The principal concern with respect to sausages is taste. Although people are aware that different meats go into them this is generally a subordinate concern. However, pork sausages are probably viewed as better tasting than beef.

COLD CUTS

Again the issue is taste and the specific meat content of limited concern.

PARTICIPANT DEMOGRAPHIC CHARACTERISTICS AND NUMBER OF TIMES DIFFERENT MEATS/FISH SERVED IN LAST 14 DAYS

		VANCOUVER		TORONTO				MONTREAL	
		I	II	I	II	III	IV	I	II
AGE									
18-34		4	1	4	5	1	-	2	3
35-49		2	3	4	2	2	5	3	3
50-64		2	4	2	3	7	4	4	3
PRESENCE OF CHILDREN									
None		4	5	3	7	6	5	7	6
One		4	1	6	3	2	1	1	3
Two		-	2	-	-	1	2	1	-
Three or more		-	-	1	-	1	1	-	-
MEAT SERVED IN LAST 14 DAYS									
Pork	None	4	-	5	-	-	2	1	-
	One	3	-	4	-	-	2	7	-
	Two	1	5	1	4	2	5	1	1
	Three	-	2	-	2	6	-	-	4
	Four	-	1	-	1	2	-	-	1
	Five or more	-	-	-	3	-	-	-	3
Ham	None	3	1	9	3	4	5	2	1
	One	2	-	-	1	1	1	1	3
	Two	1	-	-	1	2	3	2	2
	Three	-	1	-	3	1	-	2	1
	Four	1	2	-	-	2	-	1	-
	Five or more	1	4	1	2	-	-	1	2
Total Ham/Pork									
	None	-	-	4	-	-	2	1	-
	One	2	-	4	-	-	1	1	-
	Two	3	-	1	-	-	2	-	-
	Three	1	1	-	1	3	2	3	1
	Four	1	-	-	1	2	2	2	1
	Five	1	1	-	3	2	-	1	2
	Six	-	2	-	1	2	-	1	2
	Seven	-	-	1	1	1	-	-	1
	Eight or more	-	4	-	3	-	-	-	2

		VANCOUVER		TORONTO				MONTREAL	
		I	II	I	II	III	IV	I	IV
Bacon	None	3	2	5	2	-	3	4	4
	One	3	-	-	1	-	2	1	-
	Two	-	4	2	-	1	3	1	3
	Three	1	-	-	1	1	-	2	-
	Four	1	-	1	3	4	1	1	1
	Five - Ten	-	1	2	2	4	-	-	-
	Eleven or more	-	1	-	1	-	-	-	1
Sausages	None	3	3	5	7	3	5	6	4
	One	2	-	2	2	3	3	2	3
	Two	3	3	2	-	2	1	1	2
	Three	-	-	1	-	-	-	-	-
	Four	-	-	-	1	1	-	-	-
	Five or more	-	2	-	-	1	-	-	-
Fish/ Seafood	None	1	-	4	2	-	1	2	-
	One	1	1	1	2	-	3	1	3
	Two	2	1	2	2	1	1	3	2
	Three	-	2	-	1	5	1	-	2
	Four	3	-	1	1	1	1	1	-
	Five or more	1	4	2	2	2	2	2	2
Beef	None	-	-	1	1	-	-	-	-
	One	-	-	1	1	-	-	-	-
	Two	-	-	1	2	-	4	1	1
	Three	3	1	-	1	1	-	1	-
	Four	1	4	2	1	3	1	3	2
	Five	1	-	-	1	2	1	1	1
	Six	1	2	4	1	3	2	2	1
	Seven	-	-	-	1	-	1	-	-
	Eight or more	2	1	1	1	1	-	1	4
Poultry	None	1	1	-	1	-	-	-	1
	One	-	-	4	-	-	1	1	-
	Two	1	3	2	4	4	4	3	2
	Three	2	2	2	3	4	1	2	2
	Four	3	1	2	-	2	3	1	1
	Five	-	1	-	-	-	-	2	1
	Six	1	-	-	1	-	-	-	1
	Seven or more	-	-	-	1	-	-	-	1

APPENDIX C

MEAT USAGE DIARY

THE CONSUMER PANEL OF CANADA

85 EGLINTON AVENUE EAST, TORONTO, ONTARIO M4P 2Z5 (416)487-3381

Dear Panel Member,

The questionnaire attached is in the form of a "ONE-WEEK DIARY". In it I would like all meat, poultry, fish and seafood recorded, whether eaten at home or away from home, on each day of the week by all members of your household.

First of all, please fill in the "LIST OF HOUSEHOLD MEMBERS" on page 1, listing all household members and indicating their sex, age and whether for any reason they do not eat any meat, poultry or fish. There is a separate diary page for each day of the week. Please enter the names of all household members on top of each daily diary page in the spaces provided and have each person fill in their meat consumption for the day. If the person is too young to keep a diary, I would like you to keep it for your youngster.

DIARY INSTRUCTIONS:

1. Please keep the diary Monday January 19 - Sunday January 25, 1987.
2. Please try to enter information each day, so that nothing is forgotten. If you should forget a day, go back and enter the information from memory.
3. There is an EXAMPLE page on the other side of this letter - please study it before you start.
4. For A. "Type of Meat", B. 'Form/Dish", C. "How Prepared", D. "Where Eaten" and E. "Special Occasion vs Everyday Meal", please use the code list on page 2 and 3 of the diary and enter the appropriate codes for each.
5. Please return the Diary including the List of Household Members at the end of the week in the postage prepaid envelope.

You will be awarded 350 points for filling in the diary and returning it promptly at the end of the week.

Thank you for your co-operation.

Sincerely,

Carol Carter

Carol Carter

NOTE: Please see code list on page [illegible] and [illegible]
of the diary and enter codes for Type
of Meat, Form, How Prepared, Where Eaten
and Special Occasion vs Everyday Meal

EXAMPLE

MONDAY JANUARY 19

HOUSEHOLD MEMBERS (Write in Name)

	1. John	2. Mary	3. David	4. Jane	5.	6.	7.
BREAKFAST							
A. Type of Meat	187	187	187	187			
B. Form/Dish	900	900	900	900			
C. How Prepared	920	920	920	920			
D. Where Eaten	010	010	010	010			
LUNCH							
A. Type of Meat	130	342	197	197			
B. Form/Dish	902	901	901	901			
C. How Prepared	922	000	000	000			
D. Where Eaten	030	010	040	040			
E. Special Occasion vs Everyday Meal	002	002	002	002			
DINNER							
A. Type of Meat	160	160	160	160			
B. Form/Dish	900	900	900	900			
C. How Prepared	925	925	925	925			
D. Where Eaten	010	010	010	010			
E. Special Occasion vs Everyday Meal	002	002	002	002			
SNACK/BETWEEN MEALS							
A. Type of Meat		371					
B. Form/Dish		900					
C. How Prepared		000					
D. Where Eaten		010					

EXAMPLE: John had bacon (code 187) for breakfast. It was used in sliced form as purchased (code 900) was fried (code 920) and was eaten at home (code 010).
For lunch John had spaghetti with ground beef (code 130) sauce (code 902) which was boiled (code 922) and eaten at work (code 030). Everyday meal (code 002). For dinner he had pork shoulder roast (code 160) in the form it was purchased (code 900) pot roasted (code 925) and eaten at home (code 010). Everyday meal (code 002).

THE CONSUMER PANEL OF CANADA

MEAT CONSUMPTION DIARY

PLEASE KEEP THIS DIARY FOR THE WEEK OF JANUARY 19 - 25, 1987

LIST OF HOUSEHOLD MEMBERS

NAME (Write In)	SEX ( )		AGE (Write In)	Does this person have any health, religious or other reasons (e.g. vegetarian) which would prevent him/her from eating any types of meat or fish? ( )		
	MALE	FEMALE		YES	NO	If Yes – Which Meat (Write In)
1.	( )	( )		( )	( )	
2.	( )	( )		( )	( )	
3.	( )	( )		( )	( )	
4.	( )	( )		( )	( )	
5.	( )	( )		( )	( )	
6.	( )	( )		( )	( )	
7.	( )	( )		( )	( )	
8.	( )	( )		( )	( )	
9.	( )	( )		( )	( )	
10.	( )	( )		( )	( )	

A. TYPE OF MEAT (CONT'D)

CHICKEN - FRESH

268 Whole
269 Parts (whole cut up)
270 Breast-bone-in
271 Breast-boneless
272 Legs
273 Thighs
274 Drumsticks
275 Chicken schnitzel/cutlets
276 Wings
277 Necks & backs
278 Livers
279 Giblets
280 Other fresh chicken
281 Type of fresh chicken cut not known
282 Boiling fowl
283 Capon

CHICKEN - PROCESSED

- FROZEN 284 Whole
    - 285 Wings
    - 286 Legs
    - 287 Drumsticks
    - 288 Cornish hens
    - 289 Fried pieces
    - 290 Fingers
    - 291 Nuggets
    - 292 Patties/burgers
    - 293 Pies
    - 294 Dinners
- SMOKED 295 Whole
    - 296 Breast
- LUNCHEON MEATS 297 Loaf
    - 298 Roll

299 WIENERS
300 BARBEQUED IN STORE
301 COOKED CHICKEN SCHNITZEL/CUTLETS

- CANNED 302 Spread
    - 303 Flakes
    - 304 Whole

305 OTHER PROCESSED CHICKEN

OTHER MEAT AND GAME

306 Goose
307 Duck
308 Rabbit
309 Deer
310 Moose
311 Other game

TURKEY - FRESH

312 Whole
313 Breast
314 Cutlet/scallopini
315 Backs/necks
316 Wings
317 Legs - whole
318 Thighs
319 Drumsticks
320 Giblets
321 Other fresh turkey
322 Type of fresh turkey cut not known

TURKEY - PROCESSED

- FROZEN 323 Whole
    - 324 Whole pre-stuffed
    - 325 Breast
    - 326 Breast pre-stuffed
    - 327 Drumsticks
    - 328 Wings
    - 329 Fillets
    - 330 Boneless rolled roast
    - 331 Burgers
    - 332 Other frozen processed turkey
- LUNCHEON MEAT
    - 333 Cooked breast meat
    - 334 Turkey roll
    - 336 Other turkey luncheon meat
    - 336 Canned flakes
- OTHER TURKEY PROCESSED

337 WEINERS
338 SMOKED TURKEY BREAST
339 OTHER PROCESSED TURKEY

FISH

Salmon - 340 Fresh
341 Frozen
342 Canned
343 Smoked

Tuna - 344 Fresh
345 Canned

Sole - 346 Fresh
347 Frozen

Haddock - 348 Fresh
349 Frozen

Cod - 350 Fresh
351 Frozen
352 Smoked
353 Dried

Other Fish - 354 Fresh
355 Frozen
356 Canned
357 Smoked

SEAFOOD

Shrimp - 358 Fresh
359 Frozen
360 Canned

Crab - 361 Fresh
362 Frozen
363 Canned

Lobster - 364 Fresh
365 Frozen
366 Canned

Scallops- 367 Fresh
368 Frozen

Other Seafood - 369 Fresh
370 Frozen
371 Canned

372 FROG'S LEGS

B. FORM/DISH

900 Cooked/eaten in the form it was purchased*
901 Sandwich
902 Sauce
903 Pie
904 Quiche
905 Meat loaf
906 Filling for vegetables
907 Patty
908 Soup
909 Meat balls
910 Salad
911 Seafood loaf
912 Hors d'Oeuvres
913 Other

* Not used in a dish - prepared in the form purchased

C. HOW PREPARED

920 Fried
921 Broiled
922 Boiled
923 Steamed
924 Poached
925 Pot roasted
926 Roasted/baked
927 Cooked in microwave
928 Casserole
929 Barbequed
930 Stewed
931 Braised
932 Stir-fried
933 Slow-cooked
934 Pressure cooked
935 Other
000 None of the above apply

D. WHERE EATEN

010 At your home
020 Other home
030 Work
040 School
050 Restaurant
060 Take-out
070 Other

E. SPECIAL OCCASION VS EVERYDAY MEAL

001 Special occasion meal
002 Everyday meal

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

MONDAY JANUARY 19

HOUSEHOLD MEMBERS (Write in Name)

	1.	2.	3.	4.	5.	6.	7.
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

TUESDAY JANUARY 20

HOUSEHOLD MEMBERS (Write in Name)

	1. ______	2. ______	3. ______	4. ______	5. ______	6. ______	7. ______
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

WEDNESDAY JANUARY 21

	HOUSEHOLD MEMBERS (Write in Name)						
	1.	2.	3.	4.	5.	6.	7.
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

THURSDAY JANUARY 22

HOUSEHOLD MEMBERS (Write in Name)

	1.	2.	3.	4.	5.	6.	7.
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

FRIDAY JANUARY 23

HOUSEHOLD MEMBERS (Write in Name)

	1.	2.	3.	4.	5.	6.	7.
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

SATURDAY JANUARY 24

HOUSEHOLD MEMBERS (Write in Name)

	1. ____	2. ____	3. ____	4. ____	5. ____	6. ____	7. ____
BREAKFAST							
A. Type of Meat	____	____	____	____	____	____	____
B. Form/Dish	____	____	____	____	____	____	____
C. How Prepared	____	____	____	____	____	____	____
D. Where Eaten	____	____	____	____	____	____	____
LUNCH							
A. Type of Meat	____	____	____	____	____	____	____
B. Form/Dish	____	____	____	____	____	____	____
C. How Prepared	____	____	____	____	____	____	____
D. Where Eaten	____	____	____	____	____	____	____
E. Special Occasion vs Everyday Meal	____	____	____	____	____	____	____
DINNER							
A. Type of Meat	____	____	____	____	____	____	____
B. Form/Dish	____	____	____	____	____	____	____
C. How Prepared	____	____	____	____	____	____	____
D. Where Eaten	____	____	____	____	____	____	____
E. Special Occasion vs Everyday Meal	____	____	____	____	____	____	____
SNACK/BETWEEN MEALS							
A. Type of Meat	____	____	____	____	____	____	____
B. Form/Dish	____	____	____	____	____	____	____
C. How Prepared	____	____	____	____	____	____	____
D. Where Eaten	____	____	____	____	____	____	____

NOTE: Please see code list on page 2 and 3 of the diary and enter codes for Type of Meat, Form, How Prepared, Where Eaten and Special Occasion vs Everyday Meal

SUNDAY JANUARY 25

HOUSEHOLD MEMBERS (Write in Name)

	1.	2.	3.	4.	5.	6.	7.
BREAKFAST							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
LUNCH							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
DINNER							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							
E. Special Occasion vs Everyday Meal							
SNACK/BETWEEN MEALS							
A. Type of Meat							
B. Form/Dish							
C. How Prepared							
D. Where Eaten							

APPENDIX D

USAGE AND ATTITUDE QUESTIONNAIRE

ISL International Surveys Ltd.
85 Eglinton Avenue East
Toronto, Ontario
M4P 2Z5

STUDY NO.	SERIAL NO.	DATE
(1) - (3)	(4) - (7)	JAN.
4149		1987

SCREENER CITY: (WRITE IN)________________

Hello, I'm _________ of ISL International Surveys Ltd., an independent Canadian market research company. We are conducting a survey and I would like to ask you a few questions.

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
A.	ALL CONTACTS May I speak with the person in your household who is responsible for at least 50% of the household grocery shopping?	YES	1	B
		NO	2	TERM & TALLY
B.	And are you responsible for at least 50% of the household food choices?	YES	1	C
		NO	2	TERM & TALLY
C.	RE-INTRODUCE YOURSELF IF NECESSARY RECORD SEX	MALE	1	
		FEMALE	2	D
D.	Do you or does any other member of your household work for any of the following? READ LIST	RADIO STATION	1	TERM & TALLY
		ADVERTISING	2	
		PUBLIC RELATIONS	3	
		MARKET RESEARCH DEPARTMENT OR COMPANY	4	
		MAGAZINE OR NEWSPAPER	5	
		TELEVISION STATION	6	
		MEAT MANUFACTURER/PROCESSOR	7	
		MEAT SLAUGHTER HOUSE/PACKER	8	
		MEAT SECTION OF A GROCERY STORE/SUPER MARKET	9	
		LIVESTOCK FARMER/PRODUCER	10	
		NONE	11	E

Q.NO.	QUESTION	ANSWER	COL.#	Q.
E.	ALL QUALIFING AT Q.D Because we are interested in speaking to people in certain age groups, can you please tell me in which of the following groups do you belong. READ LIST	UNDER 18	1	TERM & TALLY
		18 - 24	2	
		25 - 34	3	
		35 - 44	4	
		45 - 54	5	
		55 - 64	6	
		65 AND OVER	7	F
F.	How many adults are in your household, that is aged 18 or over? WRITE IN NUMBER	Adults 18 and over ______		
	How many children are in your household between the age of ...? READ LIST WRITE IN NUMBER	0 - 6 years ______		
		7 - 11 years ______		
		12 - 17 years ______		
		TOTAL NO. OF PEOPLE IN HOUSEHOLD ______		G
G.	Do you have any health, religious, or other reasons preventing you from eating any type of meat or fish?	YES	1	H
		NO	2	1a
H.	And which meat or fish would this be?	* ALL MEAT	1	
		* PORK	2	
		BEEF	3	
		CHICKEN	4	
		LAMB	5	
		VEAL	6	
		FISH (SOME)	7	
		ALL FISH	8	SKIP NOTE
SKIP NOTE	• IF "PORK (*) OR ALL MEAT (*)" MENTIONED AT Q.H, TERM & TALLY IN APPROPRIATE COLUMN • ALL OTHERS, GO TO Q.1a			

Q.NO.	QUESTION	ANSWER 4149	COL.#	NEXT Q

REFERENCE DAYS

TODAY IS:		BEFORE YESTERDAY	YESTERDAY	COL.#
TUESDAY	1	SUNDAY	MONDAY	3
WEDNESDAY	2	MONDAY	TUESDAY	
THURSDAY	3	TUESDAY	WEDNESDAY	
FRIDAY	4	WEDNESDAY	THURSDAY	
SATURDAY	5	THURSDAY	FRIDAY	

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family yesterday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast yesterday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	1b
1b.	And what about lunch yesterday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	1c
1c.	Finally, what, was eaten at home yesterday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family the day before yesterday. And again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast the day before yesterday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ______________		
		NONE	6	2b
2b.	And what about lunch the day before yesterday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ______________		
		NONE	14	2c
2c.	Finally, what, was eaten at home in the evening the day before yesterday? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) __________		
		NONE	12	3a

4149

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
	DAY MONDAY	REFERENCE DAYS FRIDAY & SATURDAY	2	
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family on Friday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Friday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	1b
1b.	And what about lunch on Friday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	1c
1c.	Finally, what, was eaten at home on Friday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family on Saturday. And again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Saturday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	2b
2b.	And what about lunch on Saturday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	2c
2c.	Finally, what, was eaten at home on Saturday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	3a

ISL International Surveys Ltd.
85 Eglinton Avenue East
Toronto, Ontario
M4P 2Z5

STUDY NO.	SERIAL NO.	DATE
(1) - (3)	(4) - (7)	JAN.
4149		1987

SCREENER CITY: (WRITE IN)____________________

Hello, I'm _________ of ISL International Surveys Ltd., an independent Canadian market research company. We are conducting a survey and I would like to ask you a few questions.

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
A.	ALL CONTACTS May I speak with the person in your household who is responsible for at least 50% of the household grocery shopping?	YES	1	B
		NO	2	TERM & TALLY
B.	And are you responsible for at least 50% of the household food choices?	YES	1	C
		NO	2	TERM & TALLY
C.	RE-INTRODUCE YOURSELF IF NECESSARY RECORD SEX	MALE	1	
		FEMALE	2	D
D.	Do you or does any other member of your household work for any of the following? READ LIST	RADIO STATION	1	
		ADVERTISING	2	
		PUBLIC RELATIONS	3	
		MARKET RESEARCH DEPARTMENT OR COMPANY	4	
		MAGAZINE OR NEWSPAPER	5	
		TELEVISION STATION	6	
		MEAT MANUFACTURER/PROCESSOR	7	
		MEAT SLAUGHTER HOUSE/PACKER	8	
		MEAT SECTION OF A GROCERY STORE/SUPER MARKET	9	
		LIVESTOCK FARMER/PRODUCER	10	TERM & TALLY
		NONE	11	E

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
E.	ALL QUALIFING AT Q.D Because we are interested in speaking to people in certain age groups, can you please tell me in which of the following groups do you belong. READ LIST	UNDER 18	1	TERM & TALLY
		18 - 24	2	
		25 - 34	3	
		35 - 44	4	
		45 - 54	5	
		55 - 64	6	
		65 AND OVER	7	F
F.	How many adults are in your household, that is aged 18 or over? WRITE IN NUMBER	Adults 18 and over ________		
	How many children are in your household between the age of ...? READ LIST WRITE IN NUMBER	0 - 6 years ________		
		7 - 11 years ________		
		12 - 17 years ________		
		TOTAL NO. OF PEOPLE IN HOUSEHOLD ________		G
G.	Do you have any health, religious, or other reasons preventing you from eating any type of meat or fish?	YES	1	H
		NO	2	1a
H.	And which meat or fish would this be?	* ALL MEAT	1	
		* PORK	2	
		BEEF	3	
		CHICKEN	4	
		LAMB	5	
		VEAL	6	
		FISH (SOME)	7	
		ALL FISH	8	SKIP NOTE
SKIP NOTE	• IF "PORK (*) OR ALL MEAT (*)" MENTIONED AT Q.H, TERM & TALLY IN APPROPRIATE COLUMN • ALL OTHERS, GO TO Q.1a			

4149

Q.NO.	QUESTION	ANSWER	COL.→	NEXT Q.
	DAY MONDAY	REFERENCE DAYS SATURDAY & SUNDAY	I	
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family on Sunday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Sunday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	1b
1b.	And what about lunch on Sunday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	1c
1c.	Finally, what, was eaten at home on Sunday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family on Saturday. And Again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Saturday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	2b
2b.	And what about lunch on Saturday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	2c
2c.	Finally, what, was eaten at home on Saturday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	3a

Q.NO.	QUESTION	ANSWER 4149	COL.#	NEXT Q.
	DAY MONDAY	**REFERENCE DAYS** SATURDAY & SUNDAY	I	
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family on Sunday. And here I would like you to include all cold cuts, bacon and sausages.	BACON	1	
	First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Sunday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) __________		
		NONE	6	1b
1b.	And what about lunch on Sunday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
	INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) __________		
		NONE	14	1c
1c.	Finally, what, was eaten at home on Sunday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) __________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family on Saturday. And Again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Saturday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ______________		
		NONE	6	2b
2b.	And what about lunch on Saturday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ______________		
		NONE	14	2c
2c.	Finally, what, was eaten at home on Saturday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) __________		
		NONE	12	3a

4149

Q.NO.	QUESTION	ANSWER	COL.	NEXT Q.
	DAY MONDAY	REFERENCE DAYS FRIDAY & SATURDAY	2	
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family on Friday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Friday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ______________		
		NONE	6	1b
1b.	And what about lunch on Friday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		LAMB	3	
	INCLUDE COLD SLICED MEAT IN	VEAL	4	
	APPROPRIATE MEAT	PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ______________		
		NONE	14	1c
1c.	Finally, what, was eaten at home on Friday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) __________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family on Saturday. And again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Saturday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	2b
2b.	And what about lunch on Saturday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	2c
2c.	Finally, what, was eaten at home on Saturday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	3a

Q.NO.	QUESTION		ANSWER 4149		COL.#	NEXT Q
			REFERENCE DAYS		3	
	TODAY IS:		BEFORE YESTERDAY	YESTERDAY		
	TUESDAY	1	SUNDAY	MONDAY		
	WEDNESDAY	2	MONDAY	TUESDAY		
	THURSDAY	3	TUESDAY	WEDNESDAY		
	FRIDAY	4	WEDNESDAY	THURSDAY		
	SATURDAY	5	THURSDAY	FRIDAY		

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family yesterday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast yesterday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ______		
		NONE	6	1b
1b.	And what about lunch yesterday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ______		
		NONE	14	1c
1c.	Finally, what, was eaten at home yesterday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ______		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family the day before yesterday. And again, here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast the day before yesterday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ____________		
		NONE	6	2b
2b.	And what about lunch the day before yesterday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ INCLUDE COLD SLICED MEAT IN APPROPRIATE MEAT	CHICKEN	1	
		BEEF	2	
		LAMB	3	
		VEAL	4	
		PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ____________		
		NONE	14	2c
2c.	Finally, what, was eaten at home in the evening the day before yesterday? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	3a

Q.NO. | QUESTION | ANSWER | COL.#

12. PLEASE CIRCLE ONE ANSWER FOR EACH STATEMENT

STATEMENTS	Strongly Agree	Agree Somewhat	Neither Agree Nor Disagree	Disagree Somewhat	Strongly Disagree
I now eat out more often than I have in the past	5	4	3	2	1
I feel guilty when I serve convenience foods to my family	5	4	3	2	1
I always check the specials before buying any meat	5	4	3	2	1
I prefer to stick to the cuts of meat and the recipes that I know	5	4	3	2	1
I like to buy at least some of my meat from a real butcher rather than from a supermarket	5	4	3	2	1
I like trying recipes from different cultures	5	4	3	2	1
I am buying and using more fresh foods now than I did in the last few years	5	4	3	2	1
I make a point of trying out new recipes quite often	5	4	3	2	1
I'm concerned about the modern feeding methods used for animals	5	4	3	2	1
I like to know exactly what meat I'm going to buy before I go shopping	5	4	3	2	1
I pay a lot more attention to food prices now than I ever did before	5	4	3	2	1
I really like to cook	5	4	3	2	1
I would use more pork if I had more recipes to prepare it in different ways	5	4	3	2	1
When making the decision as to what food products to buy, the children's tastes should come first	5	4	3	2	1
I find cuts of meat that have leftovers very useful	5	4	3	2	1
I like to be adventurous in my cooking	5	4	3	2	1

Q.NO. QUESTION ANSWER COL. NEXT

Q.NO.	STATEMENTS	Strongly Agree	Agree Somewhat	Neither Agree Nor Disagree	Disagree Somewhat	Strongly Disagree
	There's too much talk these days about what's good and what's bad for you when it comes to food	5	4	3	2	1
	I seem to be replacing convenience foods with scratch cooking	5	4	3	2	1
	My time is short and I have to serve meals that are easy	5	4	3	2	1
	I use a lot of low calorie or calorie reduced products	5	4	3	2	1
	I'm always interested in new recipes	5	4	3	2	1
	I'm very cautious about serving foods with artificial ingredients	5	4	3	2	1
	I would like to have more variety in my cooking	5	4	3	2	1
	I always look out for specials when I shop	5	4	3	2	1
	I'm trying new things less than I used to	5	4	3	2	1
	I would use more fish if I had more recipes to prepare it in different ways	5	4	3	2	1
	I try to limit our colesterol consumption	5	4	3	2	1
	If something on the meat counter looks good I may buy it even if I didn't intend to	5	4	3	2	1
	The quality of a product is far more important than the price	5	4	3	2	1
	I try to eat natural foods most of the time	5	4	3	2	1
	These days, I'm looking for more lighter meats than I used to	5	4	3	2	1
	I often use recipes from magazines or newspapers	5	4	3	2	1

Q.NO. QUESTION ANSWER COL.#

Q.NO.	STATEMENTS	Strongly Agree	Agree Somewhat	Neither Agree Nor Disagree	Disagree Somewhat	Strongly Disagree
	I tend to buy the same products brands as my mother used to buy	5	4	3	2	1
	"These days, I have less time for food preparation	5	4	3	2	1
	I now buy more frozen foods than I have in the past	5	4	3	2	1
	Recipe ideas right in store always catch my eye	5	4	3	2	1
	My family still prefers a meal of "meat and potatoes"	5	4	3	2	1
	I am usually among the first to try new products	5	4	3	2	1
	I presently own or will eventually own a microwave oven	5	4	3	2	1
	I always look for food products with less salt or sodium	5	4	3	2	1
	I usually try to look for foods with low fat	5	4	3	2	1
	I usually decide on my menus at least a few days in advance	5	4	3	2	1
	Because of high prices, we've changed the way we eat at home	5	4	3	2	1
	When I have a favourite brand I buy it - no matter what else is on sale	5	4	3	2	1
	I'm reluctant to try new recipes unless I'm sure the family will like them	5	4	3	2	1
	I eat smaller meals nowadays instead of three big meals	5	4	3	2	1
	A well-known brand is a guarantee of high quality	5	4	3	2	1
	I eat more fresh fruit and vegetables today than before	5	4	3	2	1

IV

4149

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
3a.	ASK I TO V FOR EACH MEAT CATEGORY (EG. PORK, BEEF, ETC.) ROTATE ORDER OF ASKING MEATS. I'm going to read out some cuts of meat and fish. (HAND RESPONDENT CARD A). For each one I read, please tell me which of the phrases on this card applies to you: CIRCLE ONE RESPONSE FROM CARD A FOR EACH CUT ON NEXT PAGE I) served it since the beginning of the year II) served it since the beginning of last fall, that is early September III) have you ever served it IV) heard of it but never served V) not heard of FOR EACH CUT OF MEAT CIRCLED AT I, II or III ASK Q.'s 3b and 3c: GO STRAIGHT TO Q.3b and Q.3c BEFORE ASKING NEXT CUT		
3b)	And do you have this cut of meat at home now? CIRCLE ON NEXT PAGE AT 3B IF YES		
3c)	Do you generally serve this cut of meat in the summer? CIRCLE ON NEXT PAGE AT 3c IF YES		4a

Q.NO.	QUESTION		ANSWER					COL.	NEXT Q.
			I	II	III	IV	V	3b	3c
TICK START			BEG. OF YEAR	EARLY SEPTEMBER	EVER SERVED	HEARD OF NEVER SERVED	NOT HEARD OF	AT HOME	SUMMER
	PORK								
	1	Pork Loin Roast	1	1	1	1	1	1	1
	2	Pork Shoulder Roast	2	2	2	2	2	2	2
	3	Pork Leg Roast	3	3	3	3	3	3	3
	4	Pork Crown Rib	4	4	4	4	4	4	4
	5	Pork Loin Chops	5	5	5	5	5	5	5
	6	Butterfly Chops	6	6	6	6	6	6	6
	7	Shoulder Butt Chops	7	7	7	7	7	7	7
	8	Breaded Pork Cutlets	8	8	8	9	8	8	8
	9	Pork Loin Steak	9	9	9	9	9	9	9
	10	Pork Leg Steak	10	10	10	10	10	10	10
	11	Cubes of Pork	11	11	11	11	11	11	11
	12	Pork Tenderloin	12	12	12	12	12	12	12
	11	Ground Pork	13	13	13	13	13	13	13
	14	Pork Ribs	14	14	14	14	14	14	14
	15	Stewing Pork	15	15	15	15	15	15	15
	16	Organs, Heart, Liver, etc.	16	16	16	16	16	16	16
	VEAL, TURKEY, LAMB								
	17	Any Veal	17	17	17	17	17	17	17
	18	Any Turkey	18	18	18	18	18	18	18
	19	Any Lamb	19	19	19	19	19	19	19
	HAM, excluding sliced ham								
	20	Ham, either with or without the bone	20	20	20	20	20	20	20
	21	Ham Steak	21	21	21	21	21	21	21
	22	Shoulder/Picnic	22	22	22	22	22	22	22
	23	Cottage Roll	23	23	23	23	23	23	23
✓	BEEF								
	24	Sirloin Tip Roast	24	24	24	24	24	24	24
	25	Rump Roast	25	25	25	25	25	25	25
	26	Round Roast	26	26	26	26	26	26	26
	27	Blade Roast	27	27	27	27	27	27	27
	28	Cross Rib Roast	28	28	28	28	28	28	28
	29	Short Rib Roast	29	29	29	29	29	29	29
	30	Prime Rib Roast	30	30	30	30	30	30	30
	31	Sirloin Steak	31	31	31	31	31	31	31
	32	Round Steak	32	32	32	32	32	32	32
	33	Blade Steak	33	33	33	33	33	33	33
	34	Rib Eye Steak	34	34	34	34	34	34	34
	35	T-Bone Steak	35	35	35	35	35	35	35
	36	Rib Steak	36	36	36	36	36	36	36
	37	Flank Steak	37	37	37	37	37	37	37
	38	Ground Beef	38	38	38	38	38	38	38
	39	Beef Ribs	39	39	39	39	39	39	39
	40	Stewing Beef	40	40	40	40	40	40	40
	41	Beef Kabob/Cubes	41	41	41	41	41	41	41
	42	Organs, Heart, Liver,etc.	42	42	42	42	42	42	42
	CHICKEN								
	43	Whole Chicken	43	43	43	43	43	43	43
	44	Whole Chicken cut into parts	44	44	44	44	44	44	44
	45	Legs	45	45	45	45	45	45	45
	46	Breast	46	46	46	46	46	46	46
	47	Wings	47	47	47	47	47	47	47
	FISH/SEAFOOD								
	48	Fish	48	48	48	48	48	48	48
	49	Seafood	49	49	49	49	49	49	49

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
4a.	Do you buy boneless cuts of meat at all?	YES	1	4b
		NO	2	5a
4b.	Do you feel your use of boneless cuts of meat has increased, decreased or stayed the same over the last few years?	INCREASED	1	
		DECREASED	2	
		SAME	3	4c
4c.	What do you see as the advantages of boneless cuts of meat? PROBE FULLY			5a

Q.NO. | QUESTION | ANSWER | COL. | NEXT Q.

5a. For each of the following items I'm going to read out to you, I would like you to tell me which phrases on this card (SHOW CARD A) applies to you:
CIRCLE ONE RESPONSE FROM CARD A FOR EACH ITEM.

I) served it since the beginning of the year
II) served it since beginning of last fall, that is early September
III) have you ever served it
IV) heard of it but never served
V) not heard of

FOR EACH ITEM CIRCLED AT I, II OR III ASK Q.'s 5b and 5c.
GO STRAIGHT TO Q.5b and Q.5c BEFORE ASKING NEXT ITEM

5b) And do you have this item at home now? CIRCLE BELOW AT Q.5b IF YES

5c) Do you generally serve this item in the summer? CIRCLE BELOW AT Q.5c IF YES

TICK START		I BEG. OF YEAR	II EARLY SEPTEMBER	III EVER SERVED	IV HEARD OF NEVER SERVED	V NOT HEARD OF	5b HOME NOW	5c SUMMER	
	BACON	1	1	1	1	1	1	1	
	SAUSAGES	2	2	2	2	2	2	2	
	FRESHLY SLICED COLD CUTS	3	3	3	3	3	3	3	
✓	VACUUM PACKED OR PRE-PACKAGED COLD CUTS, BRANDED	4	4	4	4	4	4	4	
	VACUUM PACKED OR PRE-PACKAGED COLD CUTS, STORE PACKAGED	5	5	5	5	5	5	5	
	WEINERS	6	6	6	6	6	6	6	
	CANNED MEAT	7	7	7	7	7	7	7	
	CANNED FISH	8	8	8	8	8	8	8	5d

5d) And now I want to talk about the ways you like to cook food. Using this card (SHOW CARD B) please tell me roughly how often you serve meat or fish that is:
READ OUT EACH MEAL TYPE BELOW, STARTING WITH TICK (✓)

	( ) In some form of casserole or stew	( ) Broiled or grilled	( ) Stir fried	(✓) Deep fried or fried, but excluding stir fried	( ) Baked or roasted	
EVERY DAY OR ALMOST EVERY DAY	1	1	1	1	1	
3-4 TIMES A WEEK	2	2	2	2	2	
1-2 TIMES A WEEK	3	3	3	3	3	
ONCE EVERY 10 DAYS - TWO WEEKS	4	4	4	4	4	
ONCE EVERY 3 WEEKS	5	5	5	5	5	
ONCE EVERY 4 WEEKS	6	6	6	6	6	
ONCE EVERY 6 WEEKS	7	7	7	7	7	
ONCE EVERY 2 MONTHS	8	8	8	8	8	
LESS OFTEN	9	9	9	9	9	
NEVER	10	10	10	10	10	6

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
6.	SHOW BOARD Here I have a board. As you can see there are a number of items listed. I would like you to take these 20 chips. Please place them under this first column to indicate how much of each of these items you buy in proportion to all items in the list at this time of the year. When thinking about this please include all types of meat and fish that you buy including fresh, frozen and canned. Please leave the chips on when you finish. MAKE SURE RESPONDENT USES ALL 20 CHIPS DO NOT REMOVE CHIPS. RECORD NUMBER ALLOCATED FOR EACH ITEM UNDER COLUMN 6 BELOW. TOTAL MUST ADD TO 20.	(3)	9
9.	RESET SECOND COLUMN FOR SUMMER Now I would like you to think about the types of meat and fish you usually buy during the summer months. Would you have divided the chips like this (POINT TO FIRST COLUMN) or would you do it differently? IF NECESSARY: Can you please tell me how you would divide these 20 chips. ALLOW RESPONDENT TO SHIFT CHIPS ON TO SECOND COLUMN AMONGST THE ITEMS LISTED. MAKE SURE RESPONDENT USES ALL 20 CHIPS. ONCE ALL CHIPS ARE PLACED RECORD NUMBER ALLOCATED FOR EACH ITEM UNDER COLUMN 9 BELOW. NO Q.'s 7 AND 8 ON THIS QUESTIONNAIRE		10a

	Q.6 THIS YEAR	Q.9 SUMMER
CHICKEN	_____	_____
BEEF	_____	_____
PORK	_____	_____
FISH/SEAFOOD	_____	_____
VEAL	_____	_____
LAMB	_____	_____
HAM	_____	_____
ORGAN MEATS	_____	_____
TOTAL	20	20

Q.NO.	QUESTION ANSWER	COL.	NEXT Q.
10a.	Looking generally into the future, do you think you will be continuing to serve your household much of the same amount of __________ or do you expect to be serving more or less __________ in the future. (READ EACH ITEM BELOW. BEGIN WITH TICK START)		

TICK START		MORE	LESS	SAME
	PORK	1*	2*	3
	FISH	1*	2*	3
	HAM	1*	2*	3
✓	CHICKEN	1	2	3
	BEEF	1	2	3

NEXT Q.: SKIP NOTE

SKIP NOTE

- FOR "HAM, FISH AND PORK" IF THE ANSWER IS "MORE" OR "LESS" ASK APPROPRIATE QUESTION BELOW
- IF ALL ANSWERS ABOVE ARE "SAME" GO TO Q.11a

(6)

10b. **HAM:** Why do you expect to be buying (more/less) Ham in the future? PROBE FULLY

____

____

____

____

FISH: Why do you expect to be buying (more/less) Fish in the future? PROBE FULLY

____

____

____

____

PORK: Why do you expect to be buying (more/less) Pork in the future? PROBE FULLY

____

____

____

11a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
11a.	Which of these items, if any, do you tend to eat more often out of home than in home? SHOW CARD C	* BEEF	1	
		* CHICKEN	2	
	MORE THAN ONE ANSWER IS ACCEPTABLE	FISH	3	
		VEAL	4	
		LAMB	5	
		* PORK	6	
		HAM	7	SKIP NOTE
SKIP NOTE	• IF "PORK/BEEF/CHICKEN" MENTIONED AT Q.11a, GO TO Q.11b • OTHERS, GO TO Q.12		(3)	
11b.	PORK: Why do you eat more pork out of home than in home? PROBE FULLY			
	BEEF: Why do you eat more beef out of home than in home? PROBE FULLY			
	CHICKEN: Why do you eat more chicken out of home than in home? PROBE FULLY			12
12 .	Now, I'd like you to think in general terms about the ways you shop and cook, the types of meals you make and so on. Different people do different things differently and have different opinions. I have here a series of statements. I'd like you to read each one and circle one number to show how strongly you agree or disagree with it. As you'll see, some of these statements refer specifically to meat or fish, but some refer to more general cooking or shopping patterns. PRESENT BUFF PGS., IF RESPONDENT SHOWS ANY DIFFICULTY YOU SHOULD READ EACH STATEMENT WITH HER.			13a

Q.NO.	QUESTION	ANSWER	COL.	NEXT Q.

13a. I would like to read some statements which might be used to describe in general terms the meats and fish on this card (SHOW CARD D). I would like you to rate each meat and fish using a scale of numbers (SHOW CARD E) from "0" to "10" in which "0" means "definitely not" and "10" means "definitely". As I read each statement please tell me using the scale on this card (POINT TO SCALE CARD) the number from "0" to "10" you would give each of the meats and fish listed on this card (POINT TO MEAT CARD). Lets start with _________ READ STATEMENTS IN ROTATED ORDER.

NOTE: IF RESPONDENT STARTS TO MAKE DISTINCTIONS LIKE:
Meat cooked by me or someone else
or
Meat bought from one store versus another

SAY : We're just asking for your opinion of the meat in general

WRITE IN NUMBER BELOW (FROM 0 TO 10) SELECTED BY RESPONDENT FOR EACH MEAT.

TICK START		PORK	HAM	LAMB	BEEF	CHICKEN	FISH	COL.	NEXT Q.
	1 MOIST	___	___	___	___	___	___		
	2 EASY TO DIGEST	___	___	___	___	___	___		
	3 NUTRITIOUS	___	___	___	___	___	___		
✓	4 CHEWY	___	___	___	___	___	___		
	5 HIGH IN CHOLESTEROL	___	___	___	___	___	___		
	6 TASTY	___	___	___	___	___	___		
	7 EXPENSIVE	___	___	___	___	___	___		
	8 FATTY	___	___	___	___	___	___		
	9 VERSATILE	___	___	___	___	___	___		
	10 HEALTHY	___	___	___	___	___	___		
	11 TENDER	___	___	___	___	___	___		
	12 LOW IN CALORIES	___	___	___	___	___	___		
	13 HEAVY	___	___	___	___	___	___		
	14 EASY TO COOK	___	___	___	___	___	___		
	15 KEEPS WELL	___	___	___	___	___	___		13b

13b. And now, regardless of your opinion on these specific attributes we've been discussing, please rate each of these items overall using the same scale, however where 10 is excellent and 0 is very poor.

		PORK	HAM	LAMB	BEEF	CHICKEN	FISH	COL.	NEXT Q.
	OVERALL	___	___	___	___	___	___		14a

Q.NO.	QUESTION	ANSWER	COL.	NEXT Q.
	HAND RESPONDENT MEAT SHEET			
14a.	Now, I have another set of statements where I'd like you to record the answers yourself. These statements all refer to BEEF and I'd like you to circle a number for each statement to show how strongly you agree or disagree that this statement applies to BEEF.		(2)	14b
14b.	Now please answer these same questions for PORK. RESPONDENT TO TURN PAGE			SKIP NOTE
SKIP NOTE	• CHECK BACK TO Q.5a, IF SAUSAGE MENTIONED, GO TO Q.15 • ALL OTHERS, GO TO SKIP NOTE AFTER Q.18 d			
15 .	ALL SERVING SAUSAGES AT Q.5a I'd like to ask you now about all types of sausages that you have to cook, and weiners. You indicated earlier that you do serve these. (INCLUDE THINGS SUCH AS BOCKWURST, KNOCKWURST, OKTOBERFEST, AND SAUSAGE PATTY/MEAT ETC. THAT IS NOT IN A CASING). How often would you say you buy sausages and weiners? SHOW CARD F	ONCE A WEEK OR MORE	1	
		ONCE EVERY 2 WEEKS	2	
		ONCE A MONTH	3	
		ONCE EVERY 6 WEEKS	4	
		ONCE EVERY 2 MONTHS	5	
		ONCE EVERY 3 MONTHS	6	
		LESS OFTEN	7	
		NEVER	8	16
16 .	And how often do you serve or eat sausages and weiners? Please include here any sausages and weiners you may serve for breakfast. SHOW CARD B	EVERY DAY OR ALMOST EVERY DAY	1	
		3-4 TIMES A WEEK	2	
		1-2 TIMES A WEEK	3	
		ONCE EVERY 10 DAYS - TWO WEEKS	4	
		ONCE EVERY 3 WEEKS	5	
		ONCE EVERY 4 WEEKS	6	
		ONCE EVERY 6 WEEKS	7	
		ONCE EVERY 2 MONTHS	8	
		LESS OFTEN	9	
		NEVER	10	17a
17a.	Please look at this card and tell me all the types of sausages and weiners you ever buy. SHOW CARD G. RECORD BELOW			17b
17b.	Which of these do you buy most often? SHOW CARD G. RECORD BELOW, ONE ONLY			17c
17c.	And which do you have at home now? SHOW CARD G. RECORD BELOW			

	17a EVER-BUY	17b MOST OFTEN-	17c AT HOME NOW	NEXT Q.
ANY SAUSAGES, DON'T KNOW MEAT	1	1	1	
PURE BEEF SAUSAGES	2	2	2	
PURE PORK SAUSAGES INCLUDING PATTIES AND SAUSAGE MEAT	3	3	3	
SPECIALTY SAUSAGES (EG. BOCKWURST, ETC.)	4	4	4	
ANY WEINERS, DON'T KNOW MEAT	5	5	5	
PORK WEINERS	6	6	6	
BEEF WEINERS	7	7	7	
CHICKEN WEINERS	8	8	8	
NONE	9	9	9	18a

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
	SHOW BLUE CARD		
18a.	Now I'd like you to look at this card. On it are a series of statements which can be made about sausages. Please tell me which of these statements is most important to you when selecting sausages, including weiners? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW		18b
18b.	And of these remaining statements which is the next most important? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW.		18c
18c.	Now, of these remaining statements which is the next most important? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW.		18d
18d.	And which is the next most important? CIRCLE BELOW		

	18a MOST IMPORTANT	18b NEXT MOST IMPORTANT	18c NEXT MOST IMPORTANT	18d NEXT MOST IMPORTANT	
GOOD FLAVOUR	1	1	1	1	
REASONABLE PRICE	2	2	2	2	
THE TYPE OF MEAT IT'S MADE OF	3	3	3	3	
A BRAND I KNOW	4	4	4	4	
NUTRITIONAL VALUE	5	5	5	5	
CHILDREN LIKE IT (ONLY IF YOU HAVE CHILDREN)	6	6	6	6	
AMOUNT OF FAT IT CONTAINS	7	7	7	7	SKIP NOTE

SKIP NOTE	• IF "COLD CUTS"OR"CANNED MEAT" SERVED AT Q.5a, GO TO Q.19a. • ALL OTHERS, GO TO SKIP NOTE FOLLOWING Q.21d		

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q

19a

ALL SERVING COLD CUTS OR CANNED MEAT AT Q.5a

Now I'd like to ask you about Canned Meat and Sliced Meat or Cold Cuts. Please use this card SHOW CARD F to tell me how often you buy Canned Meat? CODE BELOW. And what about Freshly Sliced Cold Cuts? CODE BELOW. And Vacuum Packed or Pre-Packaged Cold Cuts? CODE BELOW.

	Canned Meat	Freshly Sliced	Vacuum/ Pre-Packaged Slices	NEXT Q
ONCE A WEEK OR MORE	1	1	1	
ONCE EVERY 2 WEEKS	2	2	2	
ONCE A MONTH	3	3	3	
ONCE EVERY 6 WEEKS	4	4	4	
ONCE EVERY 2 MONTHS	5	5	5	
ONCE EVERY 3 MONTHS	6	6	6	
LESS OFTEN	7	7	7	
NEVER	8	8	8	19b

19b.

FOR EACH BOUGHT AT ALL AT Q.19a, ASK Q's 19b & 19c.

How often are ____________ served in your household, including yourself and family, and any entertaining? SHOW CARD B.

	Canned Meat	Freshly Sliced	Vacuum/ Pre-Packaged Slices	NEXT Q
EVERY DAY OR ALMOST EVERY DAY	1	1	1	
3-4 TIMES A WEEK	2	2	2	
1-2 TIMES A WEEK	3	3	3	
ONCE EVERY 10 DAYS - TWO WEEKS	4	4	4	
ONCE EVERY 3 WEEKS	5	5	5	
ONCE EVERY 4 WEEKS	6	6	6	
ONCE EVERY 6 WEEKS	7	7	7	
ONCE EVERY 2 MONTHS	8	8	8	
LESS	9	9	9	
NEVER	10	10	10	19c.

19c

And do you serve ____________ mainly or only for yourself and your family, mainly or only for entertaining or both about equal?

	Canned Meat	Freshly Sliced	Vacuum/ Pre-Packaged Slices	NEXT Q
MAINLY OR ONLY FOR YOURSELF OR YOUR FAMILY	1	1	1	
MAINLY OR ONLY FOR ENTERTAINMENT	2	2	2	
BOTH	3	3	3	20a

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
20a.	SHOW CARD H Please look at this card and tell me all the types of Cold Cuts, that is Freshly Sliced or Pre-Packaged Meats, and Canned Meats you ever buy. RECORD BELOW.		20b
20b.	And which of these do you buy most often? RECORD BELOW ONE ONLY.		20c
20c.	Which do you have at home now? RECORD BELOW.		

	20a EVER BUY	20b MOST OFTEN	20c AT HOME NOW	NEXT Q.
SLICED HAM	1	1	1	
SLICED BEEF	2	2	2	
SLICED PORK	3	3	3	
PASTRAMI AND SMOKED/CORNED BEEF	4	4	4	
ALL TYPES OF SALAMIS	5	5	5	
BOLOGNA	6	6	6	
SLICED LUNCHEON MEAT	7	7	7	
CANNED HAM	8	8	8	
CANNED LUNCHEON MEAT	9	9	9	21a

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
21a.	SHOW BUFF CARD Now, I'd like you to look at this card. On it are a number of statements that could be made about Freshly Sliced or Vacuum Packed or Pre-Packed Cold Cuts. Please tell me which of these statements is most important when you are selecting any type of cold cuts? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW		21b
21b.	And of these remaining statements which is the next most important? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW.		21c
21c.	Now, of these remaining statements which is the next most important? CROSS OUT STATEMENT ONCE CHOSEN. CIRCLE BELOW.		21d
21d.	And which is the next most important? CIRCLE BELOW.		

	21a MOST IMPORTANT	21b NEXT MOST IMPORTANT	21c NEXT MOST IMPORTANT	21d NEXT MOST IMPORTANT	NEXT Q.
GOOD FLAVOUR	1	1	1	1	
REASONABLE PRICE	2	2	2	2	
THE MEAT IT'S MADE OF	3	3	3	3	
GETTING A VARIETY OF CUTS	4	4	4	4	
A BRAND I KNOW	5	5	5	5	
THE CHILDREN LIKE IT (ONLY IF YOU HAVE CHILDREN)	6	6	6	6	
AMOUNT OF FAT	7	7	7	7	SKIP NOTE

Q.NO.	QUESTION ANSWER	COL.#	NEXT Q.
SKIP NOTE	• IF "BACON" SERVED AT Q.5a, GO TO Q.22a • ALL OTHERS, GO TO Q.24		

Q.NO.	QUESTION	ANSWER	CD.#	NEXT Q

22 a

IF BACON EVER SERVED (See Q.5a)

I'd like to ask you now about Bacon. How often would you say you buy side or regular Bacon? SHOW CARD F. How often do you buy Back Bacon? How often do you buy Pea Meal Bacon?

	Side/Regular Bacon	Back Bacon	Pea Meal Bacon
ONCE A WEEK OR MORE	1	1	1
ONCE EVERY TWO WEEKS	2	2	2
ONCE A MONTH	3	3	3
ONCE EVERY SIX WEEKS	4	4	4
ONCE EVERY 2 MONTHS	5	5	5
ONCE EVERY 3 MONTHS	6	6	6
LESS OFTEN	7	7	7
NEVER	8	8	8

22b.

22b

FOR EACH BOUGHT AT ALL AT Q.22a ASK Q.22b, 22c, & 22d

And how often is __________ served in your household for breakfast (excluding brunch)? SHOW CARD B.

	Side/Regular Bacon	Back Bacon	Pea Meal Bacon
EVERY DAY OR ALMOST EVERY DAY	1	1	1
3-4 TIMES A WEEK	2	2	2
1-2 TIMES A WEEK	3	3	3
ONCE EVERY 10 DAYS - 2 WEEKS	4	4	4
ONCE EVERY 3 WEEKS	5	5	5
ONCE EVERY 4 WEEKS	6	6	6
ONCE EVERY 6 WEEKS	7	7	7
ONCE EVERY 2 MONTHS	8	8	8
LESS OFTEN	9	9	9
NEVER	10	10	10

22c

22c

How often is __________ served for brunch? SHOW CARD B.

	Side/Regular Bacon	Back Bacon	Pea Meal Bacon
EVERY DAY OR ALMOST EVERY DAY	1	1	1
3-4 TIMES A WEEK	2	2	2
1-2 TIMES A WEEK	3	3	3
ONCE EVERY 10 DAYS - 2 WEEKS	4	4	4
ONCE EVERY 3 WEEKS	5	5	5
ONCE EVERY 4 WEEKS	6	6	6
ONCE EVERY 6 WEEKS	7	7	7
ONCE EVERY 2 MONTHS	8	8	8
LESS OFTEN	9	9	9
NEVER	10	10	10

22d

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q

22d How often is ____________ served for a meal other than breakfast or brunch? SHOW CARD B.

	Side/Regular Bacon	Back Bacon	Pea Meal Bacon	NEXT Q
EVERY DAY OR ALMOST EVERY DAY	1	1	1	
3-4 TIMES A WEEK	2	2	2	
1-2 TIMES A WEEK	3	3	3	
ONCE EVERY 10 DAYS - 2 WEEKS	4	4	4	
ONCE EVERY 3 WEEKS	5	5	5	
ONCE EVERY 4 WEEKS	6	6	6	
ONCE EVERY 6 WEEKS	7	7	7	
ONCE EVERY 2 MONTHS	8	8	8	
LESS OFTEN	9	9	9	23a
NEVER	10	10	10	

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q
23a	Looking into the future, do you think you will be continuing to serve your household the same amount of bacon or do you expect to be serving more or less bacon in the future?	MORE	1	
		LESS	2	23b
		SAME	3	24

23b IF "MORE/LESS" AT Q. 23a, ASK:

Why do you expect to serve (More/Less) bacon in the future? PROBE FULLY.

____

____

____

____

____

24

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
24.	Finally, I'd like to focus specifically on certain cuts and forms of pork and ham. For each one I read you I'd like you to imagine you were going out to buy it but it was not available. Which meat and cut would you substitute. Imagine there is no pork in any cut available and you don't have time to go to another store. Think about what you will be buying ______________ for. What would you serve instead? ROTATE ORDER OF ASKING CUTS. IF RESPONDENT NEVER SERVES A PARTICULAR CUT OF PORK AND HAM (✓) CHECK BOX BELOW.		2	

TICK START		SUBSTITUTE	NEVER SERVE	NEXT Q.
☐	Pork Loin Roast	______________	☐	
☐	A Boneless Ham	______________	☐	
☐	Butterfly Chops	______________	☐	
✓	Pork Tenderloin	______________	☐	25

---

25. SHOW PICTURES ONE AT A TIME, IN RANDOM ORDER

And finally, just a few pictures. Each one I'm going to show you is a new cut of pork. Using this card, SHOW CARD I, please tell me how interested you would be in buying it if it were available in the store where you usually shop for your meat.

	Very Interested	Quite Interested	Unsure	Not Very Interested	Not At All Interested	NEXT Q.
Pork Steak	1	2	3	4	5	
Pork Cutlets	1	2	3	4	5	
Fresh Ready Stuffed Pork Chops	1	2	3	4	5	
Fresh Ready Stuffed Pork Roast	1	2	3	4	5	26a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
26a.	Have you ever heard of trichinosis?	YES	1	26b
		NO	2	27
26b.	Please tell me what is is.	WORMS IN PORK	1	
		PORK RELATED DISEASE/ PARASITES	2	28
		OTHER (WRITE IN)		
		______________		
		______________		27
27 .	Trichinosis is the condition that may result from eating undercooked meat containing the trichinella parasite that can be present in some meat. Have you heard of this?	YES	1	28
		NO	2	CLASS
28 .	Do you believe that any Pork available in Canadian stores has this parasite?	YES	1	
		NO	2	
		DON'T KNOW	3	29
29 .	Is the possible presence of this parasite in Pork something that concerns you a lot, quite a bit, just a little or not at all?	A LOT	1	
		QUITE A BIT	2	
		JUST A LITTLE	3	
		NOT AT ALL	4	CLASS

ISL International Surveys Ltd.
85 Eglinton Avenue East
Toronto, Ontario
M4P 2[illegible]5

STUDY NO.: 4149

NAME AND HOME ADDRESS (BLOCK CAPITALS)

NAME: ____________________ TEL. NO.: ____________________

ADDRESS: ____
(obtain complete postal information)
____

Now I have just a few more questions for statistical purposes only, in order to classify your answers along with everyone else who has participated in the survey.

SHOW INCOME CARD

Which of these income categories includes your total family income? JUST GIVE ME THE LETTER

F.	UNDER $15,000	1
C.	$15,000 - $19,999	2
H.	$20,000 - $29,999	3
T.	$30,000 - $39,999	4
G.	$40,000 - $49,999	5
K.	$50,000 AND OVER	6

DECLARATION:

I declare that the respondent was unknown to me before the interview took place and that this questionnaire has been conducted according to instructions and has been checked.

INT. SIGNATURE: ____________
INT. NAME: ____________
INT. NUMBER: ____________

DATE OF INTERVIEW: ____________
LENGTH OF INTERVIEW: ____________

PROVINCE INTERVIEWING FROM

ONTARIO	1
QUEBEC	2
MANITOBA	3
SASKATCHEWAN	4
ALBERTA	5
BRITISH COLUMBIA	6
NOVA SCOTIA	7
NEW BRUNSWICK	8
PRINCE EDWARD ISLAND	9

EDUCATION

What is the last level of education you have completed?

SOME GRADE SCHOOL	1
COMPLETED GRADE SCHOOL	2
SOME HIGH SCHOOL	3
COMPLETED HIGH SCHOOL	4
SOME COLLEGE/UNIVERSITY	5
COMPLETED COLLEGE/UNIVERSITY	6
OTHER (Specify) ____________	

What is your marital status?

MARRIED/LIVING TOGETHER	1
SINGLE	2
SEPARATED, DIVORCED, WIDOWED	3

WORKING STATUS

Are you presently working full-time, part-time or not at all?

FULL TIME	1
PART TIME	2
NOT AT ALL	3

IF WORKING ASK:

And what is your occupation? ____________

IF MARRIED/LIVING TOGETHER

What is your spouse's occupation?

____

DWELLING IS:

HOUSE	1
APARTMENT (INCLUDES DUPLEX, APARTMENT, IN HOUSE, ETC.)	2
OTHER ____________ WRITE IN	

RECORD CITY INTERVIEWING FROM:

____

4149

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
	DAY MONDAY	REFERENCE DAYS FRIDAY & SATURDAY	2	
1a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of your family on Friday. And here I would like you to include all cold cuts, bacon and sausages. First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Friday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
		OTHER (WRITE IN) ______________		
		NONE	6	1b
1b.	And what about lunch on Friday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		LAMB	3	
	INCLUDE COLD SLICED MEAT IN	VEAL	4	
	APPROPRIATE MEAT	PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ______________		
		NONE	14	1c
1c.	Finally, what, was eaten at home on Friday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) __________		
		NONE	12	2a

Q.NO.	QUESTION	ANSWER	COL.#	NEXT Q.
2a.	I'd like you to think about the meats, fish and seafood eaten in your household by all members of of your family on Saturday. And again, here I would like you to include all cold cuts, bacon and sausages.	BACON	1	
		SAUSAGE	2	
		HAM (SLICES)	3	
	First of all what, if any, type of meat, fish or seafood was eaten for breakfast on Saturday in your home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	OTHER (WRITE IN) ________		
		NONE	6	2b
2b.	And what about lunch on Saturday at home? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		LAMB	3	
	INCLUDE COLD SLICED MEAT IN	VEAL	4	
	APPROPRIATE MEAT	PORK	5	
		HAM	6	
		BACON	7	
		FISH	8	
		SEAFOOD	9	
		LUNCHEON MEATS	10	
		WEINERS/HOT DOGS	11	
		SAUSAGES	12	
		OTHER (WRITE IN) ________		
		NONE	14	2c
2c.	Finally, what, was eaten at home on Saturday evening? INCLUDE ALL FAMILY MEMBERS EATING AT HOME. DO NOT READ	CHICKEN	1	
		BEEF	2	
		PORK	3	
		LAMB	4	
		VEAL	5	
		FISH	6	
		HAM	7	
		TURKEY	8	
		SEAFOOD	9	
		OTHER (WRITE IN) ________		
		NONE	12	3a